



COMMUNITY DEVELOPMENT COMMISSION

AGENDA

Monday, January 30, 2023

Noon-1:00 p.m.

This meeting includes in-person and virtual participation.

Santiam Room

333 Broadalbin Street SW

Or join the meeting here:

<https://council.cityofalbany.net/groups/cdc/zoom>

You can use your microphone or dial in using your phone.

Phone: 1 (253) 215-8782 (Long distance charges may apply)

Meeting ID: 894 5923 3401; Passcode: 498781

1. Call to Order (Vice Chair)
2. Roll Call (Staff)
3. Approval of the Minutes (Vice Chair)
 - a. January 9, 2023
4. Scheduled Business (Staff)
 - a. Applicant Presentations
 - b. Setting Priorities and Goals
 - c. Fair Housing Survey Results
5. Business from the Public (Vice Chair)

Persons wanting to provide comments may:

 1. Email written comments to cdaa@cityofalbany.net, including your name, before **noon on the day of the meeting**.
 2. To comment virtually during the meeting, register by emailing cdaa@cityofalbany.net before **noon on the day of the meeting**, with your name. The chair will call upon those who have registered to speak.
 3. Appear in person at the meeting and register to speak.
6. Business from the Commission (Vice Chair)
 - Election of Chair and Vice Chair
7. Next Meeting Date: February 13, 2023
8. Adjournment

This meeting is accessible to the public via video connection. The location for in-person attendance is accessible to people with disabilities. If you have a disability that requires accommodation, please notify city staff at least 48-hours in advance of the meeting at: cdaa@cityofalbany.net or call 541-917-7550.

Testimony provided at the meeting is part of the public record. Meetings are recorded, capturing both in-person and virtual participation, and are posted on the City's website.



COMMUNITY DEVELOPMENT COMMISSION

MINUTES

January 9, 2023

12:00 p.m.

Hybrid – Santiam Room

Approved: DRAFT

Call to Order

Vice Chair Davis called the meeting to order at 12:00 p.m.

Roll Call

Members present: Robyn Davis, Alex Johnson II, John Robledo, Melissa Murphy, Kenneth Larson, JoAnn Miller

Members absent: Roosevelt Gray, Josiah Blaisdell, Courtney Stubbs

Approval of Minutes

12:02 p.m.

Motion: Member Johnson II moved to approve the November 21, 2022 meeting minutes as written. Member Robledo seconded the motion which passed 6-0.

Scheduled Business:

12:03 p.m.

- Agency Consultations

Planner Beth Frelander introduced City of Albany Parks and Recreation Director, Kim Lyddane. Lyddane gave an overview of what they have planned for the next five years, and how that might fit with the Community Development Block Grant (CDBG) Program. Lyddane also shared an update on the fitness court improvement at Burkhart Park that received funding from the previous grant cycle. Because of the project timing and other constraints of other funding sources, Lyddane expressed that the CDBG funds could not be used. However, she proposed using the previously awarded CDBG funds on Lehigh Park which is also in need of updates and meets the requirements for CDBG funds. The Commission agreed with that suggestion. Lyddane answered any questions about the park's projects.

Next Frelander introduced Didi Aho with Oregon Cascades West Council of Governments who gave an update on the Small Business Grant Program. Aho stated that they are in the process of creating a small business childcare grant. Aho provided some of the criteria for eligibility, as well as the goals they are trying to obtain. Aho stated that marketing flyers are being sent out in both English and Spanish, and shared timelines and future steps with the program.

Member Murphy had questions regarding program funding, which Frelander and Aho addressed and provided clarification.

Frelander next shared a PowerPoint* presentation and continued the previous meeting discussion regarding 2023-2027 Consolidated Plan Priorities and Goals.

Member Johnson II questioned if goals should be made after the new commissioners join the Community Development Commission. Additional discussion followed and it was agreed to set up draft goals to move forward to new Commission before any finalizing.

Member Davis shared that when setting goals, they should be measurable and obtainable.

Additional discussions followed regarding expanding affordable housing along the housing continuum as well as maintaining existing affordable housing draft goals.

Member Miller asked for clarification regarding the language used concerning goals and objectives. Freelander provided clarification for the language used by the Department of Housing and Urban Development (HUD) regarding these.

The next priority presented by Freelander was reducing homelessness. Members provided information on how to address this including activities the commission has supported in the past such as shelter improvements, case management and outreach/research navigation.

Member Davis inquired how to obtain homeless census information. Freelander stated that there is a yearly point and time count that she believes the Community Services Consortium heads up and counts are taken on a specific date.

Commission members discussed potential goals for this priority. From discussions Freelander consolidated that a potential goal might be to expand drug, alcohol and mental health services provided to individuals. Additional member/staff discussions followed.

Freelander stated that she would work on putting together draft goals from this meetings' discussions and that these discussions will be continued, and the remaining priorities will be addressed at the next meeting with the new Commission.

Freelander asked commissioners to weigh in on their thoughts of the current Community Development Commission meeting time slot. General census was that the current noon time limits the opportunity for community involvement. Freelander replied that she would send out something to gather commissioner input regarding meeting time.

Freelander concluded that the remaining agenda items would be addressed at the next meeting.

Business from the Public

1:01 p.m.

None.

Business From Commission

1:02 p.m.

Member Johnson II shared that the commission is in need of a social services member and is seeking help finding someone to serve and is hopeful if the meeting time changes that this vacancy can get filled.

Members also expressed concern that agency CBDG applications be complete prior to consideration by the commission.

Next Meeting Date

The next regularly scheduled meeting is Monday, January 30, 2023.

Adjournment

Vice Chair Davis adjourned the meeting at 1:07 p.m.

Respectfully submitted,

Reviewed by,

Kaitlin Martin
Administrative Assistant I

Beth Freelander
Planner II

**Documents discussed at the meeting that are not in the agenda packet are archived in the record. The documents are available by emailing cdaa@cityofalbany.net.*



Request for Applications (RFA): Community Development Block Grant Activities
Applications Due by 5:00 p.m. Thursday, January 19, 2023 (PST)
333 Broadalbin Street SW, PO Box 490, Albany, Oregon 97321-0144 | Planning 541-917-7550

EXHIBIT A: APPLICATION

5.1 Applicant Information

Applicant (organization name): Albany Helping Hands

Contact Person: Trudy Fields Email: trudy@albanyhh.org

Mailing Address: 619 9th Ave SE, Albany, OR 97322

Phone #: 541.926.4036 Agency website: www.albanyhelpinghands.com

UEI #: Y1ECKQDK97N6 EIN: 93-1244271

Organization Mission Statement:

To help relieve suffering and brokenness by providing basic life necessities.

5.2 Proposal Summary

Activity/Program Name: Communications Manager

Activity Location: Albany Helping Hands Shelter 619 9th Ave SE, Albany, OR 97322

Proposal Summary: *Provide a summary of the proposed activity and anticipated outcomes.*

Albany Helping Hands houses and serves up to 120 residents in its dorms and transitional houses. These people are high-barrier and receive a bed and basic needs daily. Other services provided include a case worker who can help them to navigate the many applications and interviews encountered on the road to self-sufficiency. Along with our residents we also serve three meals a day to many meal-challenged people, provide basic needs by providing clothing vouchers for use at our thrift store and a shower program for non-residents, have a warming center to provide an area away from the elements during the cold and rainy months and provide a cooling center in the summer. We also have a residence that houses women and children who are needing safe accommodations. Albany Helping Hands through a generous grant is in the process of adding a 30-bed low barrier addition, so we will be able to reach another sector of the home challenged. Low barrier individuals are those in active addiction or mental crisis, which will need a higher level of care.

With our ever-expanding programs and services, we plan to hire a part-time communications manager to bring our shelter into the forefront of the fight against homelessness in Albany. We need this person to enhance and maintain our database of generous donors so that we



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can produce meaningful and informative mailings to our community. These mailings are the cornerstone of our fundraising efforts. This person would also create, update, and monitor our online presence. We would like to utilize our online presence to make our shelters endeavors seen by as many people as possible. More eyes on the increasing need for help for the homeless is never a bad idea. In the past many non-monetary donations, such as food, bottled water, and hygiene products have come from the public seeing a need that has been listed on the website or Facebook page. Along with this presence, would come the need to monitor and respond to community questions. Our communications manager would be empowered to be a voice and advocate for our shelter's residents and the homeless community.

We will hire a 3-day-a-week person to be our communications manager. The successful candidate will free up our case workers and management staff to focus on their areas of expertise and make our operation more efficient. Hiring this new staff member will also reduce the expenses we incur to produce mailings "out of house." Money that can be put to use serving our people's needs.

ACTIVITY BUDGET FOR WHICH CDBG FUNDS ARE BEING REQUESTED:

CDBG Funding Request	\$	33800
Leveraged Funds/Resources	\$	1200
Total Activity Budget	\$	35000



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5.3 CDBG Application Narrative

Provide the information requested below in a **separate document** making sure the narrative corresponds to the numbers provided so the required information can be easily found to ensure a complete application. If the question does not apply to the proposed project write N/A.

Activity Description

1. Explain which priorities in Albany's 2023-2027 Consolidated Plan will be addressed by the activity.
2. Describe the community need that will be addressed by the proposed activity.
3. Explain how the activity is an effective strategy to address the identified gap in needs. Provide statistics or evidence to document the activity need.
4. Please specify which CDBG National Objective(s) will be satisfied by the proposed activity.
5. Explain how the project will promote inclusiveness and diversity. Include your agency's nondiscrimination policy for employees and clients as an attachment.
6. For faith-based organizations, explain how your agency will ensure CDBG funded activities are separate from explicitly religious activities such as worship, study of religious text, or evangelizing.

Benefit to low-income Albany residents

7. Who and how many will benefit from activity (estimate # of people, describe clients)?
8. Of these, how many are estimated to be extremely low-income (earning <30% of area median)? Is there any special emphasis on serving extremely low-income residents?

Scope of Work

9. Provide a **DRAFT SCOPE OF WORK** that outlines details about the proposed activity including all actions that will be taken to address the identified need and achieve anticipated performance measures and outcomes, and general accomplishments you intend to achieve with this activity.

Project Feasibility – Readiness to proceed

10. Please describe your readiness to proceed, whether land use or other issues are resolved and whether your organization has the administrative capacity to complete the proposed project. Describe the current organizational capacity to complete and manage the activity within the program year.
11. Please complete the schedule that follows or provide one that is applicable to the activity/project that outlines when major activities will be executed and when the project will be completed.

Organizational Capacity and Activity Sustainability

12. Describe experience and success conducting similar projects, use of federal or CDBG funds.
13. If any issues were raised during a federal program monitoring evaluation, please explain the findings and how issues were resolved.
14. Explain agency experience managing construction projects subject to Davis-Bacon and/or BOLI wage requirements and/or soliciting bids for construction projects.
15. Identify any other agencies or partners for this activity/project and define the roles and responsibilities of these partners.
16. Please explain how the agency embraces and demonstrates diversity within the organization.
17. If not fully funded, will the agency be able to pursue the activity/service (possibly at a reduced scale)?

Financial

18. Why are CDBG funds the best fit/source? Are there other sources of funding for this activity?



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5.4 Proposed Activity Budget

Provide the activity budget describing total cost, cost per task, existing (secured) project funds and unfunded costs. (DO NOT PROVIDE THE FULL AGENCY BUDGET HERE JUST THE ACTIVITY BUDGET.) Identify any and all source(s) of funding. This would include other Federal and State grants and loans, monetary donations, in-kind contributions, volunteer labor, donation of materials and supplies, etc. Use the template provided below or your own as long as the same information is provided.

Activity/Project Budget Summary (See 24 CFR 570 Subpart J)			
Estimated Total Cost of Activity:	\$35000		
CDBG Funding Requested for Activity:	\$33800		
Total Number of People/Households Served:	120 - 150		
Total Cost per Person/Household:	\$234 - 292		
Total CDBG Cost per Person/Unit	\$226 - 282		
Describe Source of Other Funds:	Amount	Amount Secured	Amount Tentative
Federal:			
State:			
Local:			
Donations/Private:	1200		
Grants:			
Loans:			
Activity Budget Detail (Non-Development Activities)			
Specific Cost Item/Description	CDBG Amount Requested	Other Funds Amount	Total Amount CDBG + Other Sources
1 year payroll expenses for .60 FTE - CM	\$33800	\$	\$33800
Computer, software, printer, office supplies		1200	1200
Total	\$33800	\$1200	\$35000



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5.5 Staff Experience and Qualifications

Identify the names of staff or contractors participating in the proposed program or activity, their role, experience they have in this role, their title, and the expected FTE on the project. Include in an attachment resumes for key personnel anticipated to work on the proposed program, project, or activity. Please make sure to identify the person responsible for collecting program performance data and preparing the quarterly reports for the City.

Employee	Experience and Qualifications
Name: Trudy Fields Title: Accounting and Office Manager FTE on This Project:	<u>Currently oversees all aspects of office management, accounting operations, fundraising, purchasing and human resources.</u>
Name: Chris Erickson Title: Albany Helping Hands Board Treasurer FTE on This Project:	<u>Many years as a CPA</u>
Name: TBD Title: Communications Manager FTE on This Project: .60 FTE	<u>TBD</u>
Name: Title: FTE on This Project:	



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5.3 CDBG Application Narrative Albany Helping Hands

Provide the information requested below in a separate document making sure the narrative corresponds to the numbers provided so the required information can be easily found to ensure a complete application. If the question does not apply to the proposed project write N/A.

Activity Description

1. Explain which priorities in Albany's 2023-2027 Consolidated Plan will be addressed by the activity. Albany Helping Hands believes that our project would address priorities number 2 and 3. Within priority number 3 (considered high priority for the 2023 grant cycle) – Reduce homelessness – Enhancing our social presence will provide information at moment's notice about our facilities and programs. More people will see what we are doing in the community. The person faced with homelessness, the hungry person, the person wanting to volunteer for a worthwhile group and the person looking to donate – all these individuals will be able to go to the same place and get the information they need. Having a concise and informative online presence will reduce homelessness by making much needed skills available to this vulnerable population. Within priority number 3 – Increase needed services – our residents fit into the categories listed in this priority: underserved and vulnerable, elderly, homeless and disabled.
2. Describe the community need that will be addressed by the proposed activity. Albany Helping Hands provides services for those experiencing homelessness and mothers with children that are escaping domestic violence.
3. Explain how the activity is an effective strategy to address the identified gap in needs. Provide statistics or evidence to document the activity need. Albany Helping Hands wants to be accessible to people. A communications manager will provide an online presence that will serve the unhomed by providing them with basic information about our services. Immediately they will be able to see if we can serve their needs. Communication and awareness are major hurdles in the fight against homelessness. More accessible information will provide clarity about how the community can help us help the people. Saving money by producing mailings and flyers in the office will free up money that can better be used to meet the needs of our residents and non-residents.
4. Please specify which CDBG National Objective(s) will be satisfied by the proposed activity. Albany Helping Hands believes that the CDBG National Objective that is satisfied by our project is to benefit low- and moderate-income persons. Albany Helping Hands serves battered spouses, elderly people, severely disabled adults, and homeless people currently. When our low barrier addition opens, we will also serve people in active addiction or mental crisis.
5. Explain how the project will promote inclusiveness and diversity. Include your agency's nondiscrimination policy for employees and clients as an attachment. Albany Helping Hands is an equal opportunity provider. No one is refused services based on their gender identity, age, race, disability, ethnicity, religion, or sexual orientation. We offer various levels of support depending on the needs of the resident or non-resident.
6. For faith-based organizations, explain how your agency will ensure CDBG funded activities are separate from explicitly religious activities such as worship, study of religious text, or evangelizing. Albany Helping Hands is a non-denominational faith-based organization. We do not discriminate based on religious beliefs and we try extremely hard to be open-minded and empathetic to all beings. We will not show any religious preferences in our communications with the community. Our communications manager will eliminate any such bias before it is published in mailings, websites, or social media.



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Benefit to low-income Albany residents

7. Who and how many will benefit from activity (estimate # of people, describe clients)? Albany Helping Hands' residents and the homeless community will benefit from the addition of a communications manager. An estimated 130 or more meals, showers and hygiene requirements are met daily for non-residents. Having a better social presence, our shelter and services will be easily accessible to those in need and those who want to help. Increased donorship will help us provide increased services to the area homeless and food challenged.
8. Of these, how many are estimated to be extremely low-income (earning <30% of area median)? Is there any special emphasis on serving extremely low-income residents? Albany Helping Hands' focus is to serve those who are low-income, with 95% or more of our residents and non-residents fitting into this category.

Scope of Work

9. Provide a DRAFT SCOPE OF WORK that outlines details about the proposed activity including all actions that will be taken to address the identified need and achieve anticipated performance measures and outcomes, and general accomplishments you intend to achieve with this activity. Albany Helping Hands believes that having a communications manager 3 days a week will directly benefit the quality of services we are able to provide to residents and non-residents. The communications manager will be an active set of eyes and ears to the needs of those we serve. This person will provide the community with a resource to utilize in the quest to reduce homelessness, whether it be providing shelter or food for someone experiencing homelessness or providing a means to volunteer or donate to our mission. This person will provide the most up to date information for everyone.

Project Feasibility – Readiness to proceed

10. Please describe your readiness to proceed, whether land use or other issues are resolved and whether your organization has the administrative capacity to complete the proposed project. Describe the current organizational capacity to complete and manage the activity within the program year. Albany Helping Hands is ready to advertise and hire a communications manager. Our staff is in dire need of the added position to free up time to better serve our functions and residents. Our Executive Director will manage the communications manager and the remaining staff will bring the person up to speed with our services and procedures. The communications manager will not be starting from scratch as we currently have a poorly maintained website and a Facebook page that is not accessible.
11. Please complete the schedule that follows or provide one that is applicable to the activity/project that outlines when major activities will be executed and when the project will be completed.
 - a. Post the communications manager job opening in mid-April 2023
 - b. Hire the successful candidate by mid to late-May 2023
 - c. Candidate will start work in June 2023
 - d. Onboarding and acclimation to facility will be complete by the end of July 2023
 - e. Full job requirements will be met by the end of August 2023
 - f. The goal is to find alternative funding for this position by the time CDBG funding ends

Organizational Capacity and Activity Sustainability

12. Describe experience and success conducting similar projects, use of federal or CDBG funds. Albany Helping Hands has used CDBG funding for other positions within our shelter and we feel confident that we can achieve success again.



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13. If any issues were raised during a federal program monitoring evaluation, please explain the findings and how issues were resolved. N/A
14. Explain agency experience managing construction projects subject to Davis-Bacon and/or BOLI wage requirements and/or soliciting bids for construction projects. N/A
15. Identify any other agencies or partners for this activity/project and define the roles and responsibilities of these partners. N/A
16. Please explain how the agency embraces and demonstrates diversity within the organization. Albany Helping Hands is an equal opportunity provider and employer. At the time of hire, each employee is required to read and sign our anti-discrimination policy. This policy is also posted in our employee notice area. We are a multigenerational workforce, with employees ranging from 30 to 65. We also have employees who proudly express "individual sexual orientation." At the shelter, residents' range in age from 18 to 78. There is no age cap on providing services to our residents. At the Bailey Home (for mothers with children) we serve all ages of mothers and children (under the age of 18). We acknowledge many religious/cultural holidays for our staff and residents.
17. If not fully funded, will the agency be able to pursue the activity/service (possibly at a reduced scale)? Albany Helping Hands is determined to hire a communications manager. Since we are partially reliant on donations, we would depend on that funding source.

Financial

18. Why are CDBG funds the best fit/source? Are there other sources of funding for this activity? Albany Helping Hands believes that CDBG funds are fitting for this project as those funds are geared toward assisting low to moderate income individuals. The majority of those that we serve are without any income or considered low income. Our goal is to use CDBG funds to hire a communications manager and through advancement of our social presence increase our donations and find other funding sources to maintain this position once CDBG funds are spent.



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Exhibit B: REQUIRED CDBG CERTIFICATIONS

If this agency (name): Albany Helping Hands is awarded funding, the agency agrees that:

1. The recipient has a DUNS # and is or will be registered in the U.S. System for Award Management at <http://sam.gov> before contract award and will update registration as necessary.
2. The recipient will provide liability insurance coverage as required by the City of Albany, and worker's compensation and payment of payroll taxes as required by Federal and State laws.
3. All expenditures must have adequate documentation and all accounting records and supporting documentation shall be available for inspection by City of Albany upon request, and funds will not be used to provide services/assistance for the same costs/losses from other funding sources.
4. All procurement (purchase) transactions regardless of whether negotiated or advertised and without regard to dollar value shall be conducted in a manner to provide maximum open free competition.
5. Financial records, support documentation, statistical records, and all other records pertinent to funding shall be retained for a period of ten years following completion of project/activity.
6. The recipient shall establish safeguards to prohibit employees from using their positions for a purpose that has the appearance of being motivated by a desire for private gain for themselves or others.
7. All materials submitted shall become public records retained by the City of Albany, except that late applications will be returned to the applicant without further review.
8. No person, on the basis of race, color, national origin, sex, gender identity, familial status, religion, disability, age, veteran status, or any other characteristic protected under applicable federal, state, or local laws should be excluded from participation in, be denied the benefit of, or be otherwise subjected to discrimination under the program or activity funded in whole or part by CDBG funds. The funding recipient agrees to furnish copies of applicable policies and procedures upon request.
9. Employment made by or resulting from CDBG funding from the City of Albany shall not discriminate against any employee or applicant on the basis of disability, age, race, color, religion, sex, or national origin.
10. None of the funds, materials, property, or services provided directly or indirectly under CDBG funding from the City of Albany shall be used for any partisan political activity, or to further the election or defeat of any candidate for public office.
11. Letter of commitment from other funding sources and/or letters of support for your project shall be furnished to the City of Albany upon request.
12. **Authorization to request funds:** I acknowledge the statements above and certify the information contained in this application is true and correct. I further understand material omission or false information contained in this application constitutes grounds for disqualification.

Signature

Date

Chris Erickson, Albany Helping Hands Board of Directors Treasurer



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Exhibit C: CONFLICT OF INTEREST CERTIFICATION

Applicant has no conflict of interests with any City of Albany appointed or elected representatives and does not employ City appointed or elected representatives or their families.

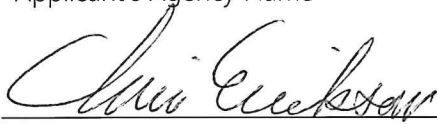
Conflict of Interest. The undersigned Applicant and each person signing on behalf of the Applicant certifies, and in the case of a sole proprietorship, partnership, or corporation, each party thereto certifies as to its own organization, under penalty of perjury, that to the best of their knowledge and belief, no member of the City Council, officer, employee, or person, whose salary is payable in whole or in part by the City, has a direct or indirect financial interest in the award of funds, or in the services to which this Application relates, or in any of the profits, real or potential, thereof, except as noted otherwise herein. The undersigned hereby submits this Application to furnish all services and activities as indicated in the Application submittal.

Furthermore, Applicant must disclose any real or perceived conflict of interest, current or past relationships with City of Albany employees, appointed or elected officials associated with this program.

Disclosure: N/A

SIGNATURE OF AUTHORIZED PERSON:
(notarization is not required)

The Applicant hereby certifies that the information contained in these certifications and representations is accurate, complete, and current.

<u>Albany Helping Hands</u>	<u>(541) 926.4036</u>
Applicant's Agency Name	Phone Number
<u></u>	<u>1-19-2023</u>
Signature	Date

Chris Erickson, Albany Helping Hands Board of Directors Treasurer

Section 3 Business or Individual (check applicable box):

☐ Yes ☐ No

Disadvantaged, Minority, Emerging Small Business (DMESB) (check applicable box):

☐ Yes ☐ No



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Exhibit D: ANTI-LOBBYING STATEMENT

The anti-lobbying provisions will apply to any person who is an employee, agent, consultant, officer, elected or appointed official of the subrecipient that is receiving CDBG or CDBG-CV funds.

Applicant certifies that:

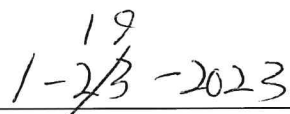
1. No Federal funds have been paid or will be paid, by or on behalf of the applicant agency, to any person for influencing or attempting to influence an officer or employee of the awarding of any Federal, state or municipal contract, the making of any Federal or municipal grant, the making of any Federal or municipal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment or modification of any Federal, state or municipal contract, grant, loan or cooperative agreement.
2. If any funds other than Federal funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any Federal or municipal agency/department, Member of Congress, an officer or employee of Congress, an employee of a Member of Congress, Mayor, City Council member, or employee of the Mayor or a City Council member in connection with this application, contract, grant, loan or cooperative agreement, it will complete and submit Standard Form-LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions; and
3. It will require that the language of paragraph 1 and 2 of this anti-lobbying certification be included in the award documents for all subcontractor awards at all tiers.

SIGNATURE OF AUTHORIZED PERSON:

(notarization is not required)



Signature



Date



EXHIBIT E - APPLICANT REPRESENTATIONS AND CERTIFICATION REGARDING DEBARMENT, SUSPENSION AND OTHER RESPONSIBILITIES

The Applicant certifies to the best of its knowledge and belief by initialing next to each statement that neither it nor any of its principals:

1. CE Are presently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from submitting bids or Applications by and federal, state or local entity, department or agency;
2. CE Have within a five-year period preceding the date of this certification been convicted of fraud or any other criminal offense in connection with obtaining, attempting to obtain, or performing a public (federal, state, or local) contract embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
3. CE Are presently indicted for or otherwise criminally charged with commission of any of the offenses enumerated in Paragraph 2 of this certification;
4. CE Have, within a five-year period preceding the date of this certification had a judgment entered against contractor or its principals arising out of the performance of a public or private contract;
5. CE Have pending in any state or federal court any litigation in which there is a claim against applicant or any of its principals arising out of the performance of a public or private contract; and
6. CE Have within a five-year period preceding the date of this certification had one or more public contracts (federal, state, or local) terminated for any reason related to contract performance or compliance.

If Applicant is unable to attest to any of the statements in this certification, Applicant shall attach an explanation to the Application. The inability to certify to all of the statements may not necessarily preclude the Applicant from award of a contract under this procurement.

SIGNATURE OF AUTHORIZED PERSON:

(notarization is not required)

Signature

1-19-2023

Date

EXHIBIT F – CERTIFICATION OF INSURANCE REQUIREMENTS

All Subrecipients shall at all times maintain insurance in the coverage limits noted below at Applicant's expense.

Preferred limits below may be adjusted on a case by case basis.

Workers' Compensation insurance in compliance with ORS 656.017, which requires subject employers to provide workers' compensation coverage in accordance with ORS Chapter 656 or CCB (Construction Contractors Board) for all subject workers. Contractor and all subcontractors of Contractor with one or more employees must have this insurance unless exempt under ORS 656.027. **Employer's Liability Insurance with coverage limits of not less than \$1,000,000 must be included. If Contractor does not have coverage, and claims to be exempt, Contractor must indicate exemption below with qualified reasons for exemption, ORS 656.027.** Out-of-state Contractors with one or more employees working in Oregon in relation to this Contract must have Workers' Compensation coverage from a state with extraterritorial reciprocity, or they must obtain Oregon specific Workers' Compensation coverage ORS 656.126. ☐ Check this box if Contractor is exempt and provide qualified reason: _____

Professional Liability insurance covering any damages caused by error, omission or any negligent acts of the Contractor, its subcontractors, agents, officers, or employees' performance under this Contract. **Combined single limit per occurrence shall not be less than \$2,000,000. Annual aggregate limit shall not be less than \$2,000,000.** If coverage is on a claims-made basis, then either an extended reporting period of not less than 24 months shall be included in the Professional Liability insurance coverage, or Contractor shall provide **Tail Coverage**.

- ☐ If this box is checked, the limits shall be \$1,000,000 per occurrence and \$1,000,000 in annual aggregate.
☐ Required by City ☒ Not Required by City (Needs Finance Insurance Review and Approval.)

Commercial General Liability insurance with coverage satisfactory to the City on an occurrence basis. **Combined single limit shall not be less than \$2,000,000 per occurrence for Bodily Injury and Property Damage and annual aggregate limit for each shall not be less than \$3,000,000.** Coverage may be written in combination with Automobile Liability Insurance (with separate limits). **Annual aggregate must be on a "per project basis".** A combination of primary and **Excess/Umbrella insurance** may be used to meet the required limits of insurance.

- ☐ If this box is checked, the limits shall be \$1,000,000 per occurrence and \$2,000,000 in annual aggregate.
☐ If this box is checked, the limits shall be \$5,000,000 per occurrence and \$5,000,000 in annual aggregate.
☒ Required by City ☐ Not Required by City (Needs Finance Insurance Review and Approval.)

Automobile Liability covering all owned, non-owned, or hired vehicles. This coverage may be written in combination with the Commercial General Liability insurance (with separate limits). **Combined single limit per occurrence shall not be less than \$2,000,000.** Use of personal automobile liability insurance coverage may be acceptable if evidence that the policy includes a business use endorsement is provided.

- ☐ If this box is checked, the limits shall be \$1,000,000 per occurrence.
☐ If this box is checked, the limits shall be \$5,000,000 per occurrence.
☒ Required by City ☐ Not Required by City (Needs Finance Insurance Review and Approval.)

Pollution Liability covering Contractor's or appropriate subcontractor's liability for bodily injury, property damage and environmental damage resulting from sudden accidental and gradual pollution and related cleanup costs incurred by Contractor, all arising out of the Goods delivered or Services (including transportation risk) performed under this Contract is required. If this coverage is on a claims-made basis, the policy must provide a 24-month extended reporting period. **Coverage must have a limit of not less than \$2,000,000 per incident/claim and \$2,000,000 policy annual aggregate.**

- ☐ Required by City ☒ Not Required by City (Needs Finance Insurance Review and Approval.)

Sexual Abuse and Molestation for the duration of the contract and for the period of time in which Contractor is providing business services. **Coverage must include limits of not less than \$1,000,000.**

☐ Required by City ☒ Not Required by City (Needs Finance Insurance Review and Approval.)

Coverage must be provided by an insurance company authorized to do business in Oregon or rated by A.M. Best's Insurance Rating of no less than A-VII or City approval. Contractor's coverage will be primary in the event of loss and state the deductible or retention level. Contractor shall provide a current Certificate of Insurance and renewal upon expiration of any of the required coverages. Contractor shall immediately notify the City of any change in insurance coverages.

Additional Insured - the City must be listed as an Additional Insured by endorsement for any General Liability policy on a primary and non-contributory basis. Such coverage will specifically include products and completed operations coverage.

Description of Operations shall state: "Project Name: The City of Albany, its officers, employees and agents are additional insureds with respect to Contractor's activities to be performed under this Contract. Coverage shall be primary and non-contributory with any other insurance and self-insurance, (include the number). This form is subject to policy terms, conditions and exclusions."

A copy of the endorsement shall be attached to the Certificate of Liability Insurance. Contractor shall provide complete copies of insurance policies if requested by the City.

Certificate holder shall be listed as: City of Albany, P.O. Box 490, Albany, OR 97321.

Certificates of Insurance may be emailed to City of Albany, Finance Dept., Diane Murzynski, at insurance@cityofalbany.net.

Signature Block:



Applicant's Acceptance: **Chris Erickson**

Date: 1-19-2023

Company Name: **Albany Helping Hands**



Request for Applications (RFA): Community Development Block Grant Activities
Applications Due by 5:00 p.m. Thursday, January 19, 2023
333 Broadalbin Street SW, Albany, Oregon 97321-0144 | BUILDING 541-917-7553 | PLANNING 541-917-7550

Exhibit G: RELIGIOUS/FAITH-BASED ORGANIZATION CERTIFICATION

If the agency is or represents that it is, or may be deemed to be, a religious or denominational institution or organization or an organization operated for religious purposes. The agency agrees that, in connection with such community development activities and operational costs:

1. It will not discriminate against any persons seeking CDBG-funded services and/or related services on the basis of religion or religious belief; and
2. It will not use CDBG funds to support any inherently religious activities, such as worship, religious instruction, or proselytization.

The agency/subrecipient is NOT a religious organization.

Signature

Date

Printed Name and Title

Agency Name

The agency/subrecipient IS a religious or faith-based organization and agree to follow terms above.

A handwritten signature in black ink, appearing to read "Chris Erickson", written over a horizontal line.

Signature

A handwritten date "1-19-2023" in black ink, written over a horizontal line.

Date

Chris Erickson, Albany Helping Hands Board of Directors Treasurer

Agency Name Albany Helping Hands

Albany Helping Hands

Profit and Loss

October 2021 - September 2022

	TOTAL
Revenue	
4010 Charitable Agencies & Clubs	28,860.04
4011 Individual Donations	135,799.36
4012 Church Donations	18,893.62
4013 Business Donations	49,077.21
4100 In-Kind Contributions	4,879.00
4200 Foundation/Trust Grants	320,747.10
4510 Government Grants	59,756.04
5300 Sales & Services Income	263,987.44
5345 Interest Income	416.86
5350 Rental Income	152,167.72
5351 Bailey House	0.00
Sales	4,252.53
Unapplied Cash Payment Income	169.90
Uncategorized Income	0.10
Total Revenue	\$1,039,006.92
GROSS PROFIT	\$1,039,006.92
Expenditures	
40001 Benevolent	25,066.00
4001 Reconciliation Discrepancies	730.33
6999 Uncategorized Expenses	4,303.96
7220 Salary and Wages	328,894.89
Benefits	3,513.42
Total 7220 Salary and Wages	332,408.31
7250 Payroll Taxes	139,498.05
7300 Contracted Services	56,739.52
7510 Professional fundraising fees	68.00
7520 Accounting Fees	1,876.73
7522 Bank Charges & Fees	4,395.02
7523 Bookkeeping & Payroll	5,948.00
Total 7520 Accounting Fees	12,219.75
7530 Legal Fees	96.00
7532 Licenses,Permits & Bonds	3,323.88
7533 Taxes and Fees	938.93
Total 7530 Legal Fees	4,358.81
8110 Supplies	29,623.94
8111 Office Supplies	2,759.05
8112 Food	4,935.86
8113 Janitorial	19,273.94
Total 8110 Supplies	56,592.79
8115 Production Materials	1,920.01
8120 Merchandise for Sale	924.30
8125 U-Haul Expense	6,911.06

Albany Helping Hands

Profit and Loss

October 2021 - September 2022

	TOTAL
8130 Telephone & Telecommunications	22,768.39
8140 Postage and shipping	1,697.35
8150 Advertising	2,180.20
8151 Newspaper	105.00
Total 8150 Advertising	2,285.20
8170 Printing & Publications	347.00
8200 Occupancy	473.93
8215 Tax on Property	5,512.12
8220 Electricity	7,482.25
82201 816 Jefferson St SE	3,361.22
8222 821 Jackson Street	706.39
8223 Operations Electricity	9,652.91
8224 Dormitory Electricity	7,579.51
8226 Store Electricity	3,067.49
8227 513 9th Ave Albany	2,680.82
8229 527 9th ave	2,072.00
Total 8220 Electricity	36,602.59
8230 Gas	6,820.28
8233 Operations Gas	108.97
8235 Store Gas	3,572.63
Total 8230 Gas	10,501.88
8245 Insurance	40,512.98
8250 Sewer	
8252 Santiam Sewer	854.27
8253 Operations Sewer	150.00
8258 513 9th Ave Albany	2,662.10
Total 8250 Sewer	3,666.37
8260 Water	15,704.25
8251 City of Albany-	5,051.33
Total 8260 Water	20,755.58
8270 Garbage collection	3,588.90
8273 Operations Garbage	7,779.16
8277 Store Garbage	8,675.47
Total 8270 Garbage collection	20,043.53
Total 8200 Occupancy	138,068.98
8280 Equipment Rental & Maintenance	6,111.16
8281 Building Repairs/Maintenance	16,867.84
8290 Automotive	
8291 Gasoline	15,663.44
Total 8290 Automotive	15,663.44
8297 Vehicle Repair & Maintenance	10,004.83
8302 Chevy Van	275.00

Albany Helping Hands

Profit and Loss

October 2021 - September 2022

	TOTAL
Total 8297 Vehicle Repair & Maintenance	10,279.83
8310 Travel	
8315 Transportation	788.00
8316 Supplies	121.92
8317 Maintenance	336.01
8318 Insurance	923.29
8319 License	467.88
Total 8315 Transportation	2,637.10
Total 8310 Travel	2,637.10
8330 Education,Classes,&Memberships	210.50
8450 Depreciation, depletion, etc.	76,550.00
8510 Interest & Late Fees	9,674.07
8590 Other Itemized Expenses	2,863.02
8592 Medical/Hygeine	984.38
8593 Allowance	45,444.13
8599 Other	198.79
Total 8590 Other Itemized Expenses	49,490.32
Purchases	976.84
Uncategorized Expense	903.07
Total Expenditures	\$996,271.98
NET OPERATING REVENUE	\$42,734.94
Other Expenditures	
Reconciliation Discrepancies-1	2,674.63
Total Other Expenditures	\$2,674.63
NET OTHER REVENUE	\$ -2,674.63
NET REVENUE	\$40,060.31



Conflict of Interest and Compensation Policy of Albany Helping Hands ("the Corporation")

Adopted by the Board of Directors on July 15, 2021

I. Overview

1. Purpose

The purpose of this Conflict of Interest and Compensation Policy (the "policy") is to protect the Corporation's interests when it is considering taking an action or entering into a transaction that might benefit the private interests of a director, officer or employee, result in the payment of excessive compensation to a director, officer or key person; or otherwise violate state and federal laws governing conflicts of interest applicable to nonprofit, charitable organizations.

2. Why is a policy necessary?

As a nonprofit, charitable organization, the Corporation is accountable to both government agencies and members of the public for responsible and proper use of its resources. Directors, officers and employees have a duty to act in the Corporation's best interests and may not use their positions for their own financial or personal benefit.

Conflicts of interest must be taken very seriously since they can damage the Corporation's reputation and expose both the Corporation and affiliated individuals to legal liability if not handled appropriately. Even the appearance of a conflict of interest should be avoided, as it could undermine public support for the Corporation.

3. To whom does the policy apply?

This policy applies to all directors, officers and employees.

II. Identifying Conflicts of Interest

1. What is a conflict of interest?

A potential conflict of interest arises when a director, officer or employee, or that person's **relative**¹ or business (a) stands to gain a financial benefit from an action the Corporation takes or a transaction into which the Corporation enters; or (b) has another interest that impairs, or could be seen to impair, the independence or objectivity of the director, officer or employee in discharging their duties to the Corporation.

2. What are some examples of potential conflicts of interest?

It is impossible to list all the possible circumstances that could present conflicts of interest. Potential conflicts of interest include situations in which a director, officer or employee or that person's relative or business:

¹ **Relative** means a person's spouse or domestic partner, ancestors, brothers and sisters (whether whole or half-blood), children (whether natural or adopted), grandchildren, great-grandchildren, and spouses or domestic partners of brothers, sisters, children, grandchildren and great-grandchildren.

- has an ownership or investment interest in any third party that the Corporation deals with or is considering dealing with;
 - serves on the board of, participates in the management of, or is otherwise employed by or volunteers with any third party that the Corporation deals with or is considering dealing with;
 - receives or may receive compensation or other benefits in connection with a transaction into which the Corporation enters;
 - receives or may receive personal gifts or loans from third parties dealing with the Corporation;
 - serves on the board of directors of another nonprofit organization that is competing with the Corporation for a grant or contract;
 - has a close personal or business relationship with a participant in a transaction being considered by the Corporation;
 - would like to pursue a transaction being considered by the Corporation for their personal benefit.
3. In situations where you are uncertain, err on the side of caution and disclose the potential conflict as set forth in Section III of this policy.
 4. **A potential conflict is not necessarily a conflict of interest.** A person has a conflict of interest only if the Finance Committee decides, pursuant to Section IV of this policy, that a conflict of interest exists.

III. Disclosing Potential Conflicts of Interest

1. You must disclose to the best of your knowledge all potential conflicts of interest as soon as you become aware of them and always before any actions involving the potential conflict are taken. Submit a signed, written statement disclosing all the material facts to the Finance Committee.
2. You must file an annual disclosure statement in the form attached to this policy. **If you are a director or officer**, you must also file this statement prior to your initial election. Submit the form to the chair of the Finance Committee.

IV. Determining Whether a Conflict of Interest Exists

1. After there has been disclosure of a potential conflict and after gathering any relevant information from the concerned director, officer or employee, the Finance Committee shall determine whether there is a conflict of interest. The director, officer or employee shall not be present for deliberation or vote on the matter and must not attempt to influence improperly the determination of whether a conflict of interest exists.
2. In determining whether a conflict of interest exists, the Finance Committee shall consider whether the potential conflict of interest would cause a transaction entered into by the Corporation to raise questions of bias, inappropriate use of the Corporation's assets, or any other impropriety.

3. A conflict always exists in the case of a **related party transaction** – a transaction, agreement or other arrangement in which a **related party**² has a financial interest and in which the Corporation or any affiliate of the Corporation is a participant.³
4. If the Finance Committee determines that there is a conflict of interest, it shall refer the matter to the board of directors ("board").

V. Procedures for Addressing a Conflict of Interest

1. When a matter involving a conflict of interest comes before the board, the board may seek information from the director, officer or employee with the conflict prior to beginning deliberation and reaching a decision on the matter. However, a conflicted person shall not be present during the discussion or vote on the matter and must not attempt to influence improperly the deliberation or vote.
2. **Additional Procedures for Addressing Related Party Transactions**
 - a. The Corporation may not enter into a related party transaction unless, after good faith disclosure of the material facts by the director, officer or employee, the board or a committee authorized by the board determines that the transaction is fair, reasonable and in the Corporation's best interest at the time of such determination.
 - b. If the related party has a substantial financial interest, the board or authorized committee shall:
 - i. prior to entering into the transaction, consider alternative transactions to the extent available;
 - ii. approve the transaction by a vote of not less than a majority of the directors present at the meeting; and
 - iii. contemporaneously document in writing the basis for its approval, including its consideration of any alternative transactions.

VI. Minutes and Documentation

The minutes of any board meeting at which a matter involving a conflict of interest or potential conflict of interest was discussed or voted upon shall include:

² A **related party** is:

1. a director, officer or employee of the Corporation or any affiliate of the Corporation, or
2. a relative of any individual described in (1), or
3. an entity in which any individual described in (1) or (2) has an ownership or beneficial interest of 35% or more, or in the case of a partnership or professional Corporation, a direct or indirect ownership interest in excess of 5%.

³ A transaction is not a related party transaction if:

1. the transaction, or the related party's financial interest in the transaction, is *de minimis*;
2. the transaction would not customarily be reviewed by the board or the boards of similar organizations in the ordinary course of business and is available to others on the same or similar terms;
3. the transaction constitutes a benefit provided to a related party solely as a member of a class of the beneficiaries that the Corporation intends to benefit as part of the accomplishment of its mission (and that benefit is available to all similarly situated members of the same class on the same terms).

- a. the name of the interested party and the nature of the interest;
- b. the decision as to whether the interest presented a conflict of interest;
- c. any alternatives to a proposed contract or transaction considered by the board; and
- d. if the transaction was approved, the basis for the approval.

VII. Prohibited Acts

The Corporation shall not make a loan to any director or officer.

VIII. Procedures for Determining Compensation

1. No person shall be present for or participate in board or committee discussion or vote pertaining to:

- a. their own compensation;
- b. the compensation of their relative;
- c. the compensation of any person who is in a position to direct or control them in an employment relationship;
- d. the compensation of any person who is in a position to directly affect their financial interests; or
- e. any other compensation decision from which the person stands to benefit.

2. In the case of compensation of Key Persons, the following additional procedures apply:

- a. The board or a committee authorized by the board shall approve compensation before it is paid.
- b. The board or authorized committee shall base approval of compensation on appropriate data, including compensation paid by comparable organizations (three are sufficient if the Corporation's income is less than \$1,000,000) for functionally similar positions, availability of similar services in the geographic area of the Corporation, and compensation surveys compiled by independent firms.
- c. The board or authorized committee shall contemporaneously document:
 - i. the terms of compensation and date of determination;
 - ii. the members of the board or committee who were present and those who voted for it;
 - iii. the comparability data relied on and how it was obtained;
 - iv. if the compensation is higher or lower than the range of comparable data, the basis for the determination, and;
 - v. any actions with respect to consideration of the compensation by anyone on the board or committee who had a conflict of interest with respect to the matter.

Albany Helping Hands
Conflict of Interest Disclosure Statement

By signing below, I affirm that:

1. I have received and read a copy of the Conflict of Interest and Compensation Policy;
2. I agree to comply with the policy;
3. I have no actual or potential conflicts as defined by the policy or if I have, I have previously disclosed them as required by the policy or am disclosing them below.

Disclose here, to the best of your knowledge:


1. any entity in which you participate (as a director, officer, employee, owner, or member) with which the Corporation has a relationship;
2. any transaction in which the Corporation is a participant as to which you might have a conflicting interest; and
3. any other situation which may pose a conflict of interest.

Name:

Position:

Signature:

Date:


Executive Board Member Signature
CHRIS ERICKSON, TREASURER

7-15-2021
Date



Albany Helping Hands Shelter

619 9th Ave SE

Albany, Oregon 97322

(541) 926.4036

www.albanyhelpinghands.com

Don Sparks, Executive Director

Officers

President:	Michael Davis
Vice President:	Corey Bontrager
Secretary:	Marilee Sapp
Treasurer:	Chris Erickson
Chaplain:	Jim Sapp

Voting Members

Emerson Smoker

John Donovan

Nick Ochse

Jeanne Howell

Gloria Bond

Erik Anderson

Robert Anderson

Mike Stanley



Albany Helping Hands Shelter Non-Discrimination Policy

Albany Helping Hands does not and shall not discriminate on the basis of race, color, religion, gender, gender expression, age, national origin, disability, marital status, sexual orientation, or military status, in any of its activities or operations. These activities include, but are not limited to, provision of services, housing, hiring and firing of staff, and selection of volunteers and vendors. We are committed to providing an inclusive and welcoming environment for all clients, staff, volunteers, and vendors.

I have read, understand, and will comply with the Albany Helping Hands Non-Discrimination policy.

Signature: _____ Date: _____

Print Name: _____



JOB DESCRIPTION

COMMUNICATIONS

MANAGER

The Communications Manager is responsible for developing and implementing external communications and marketing strategies, leading the initiative in building Albany Helping Hand's public image, and brand and advertising while ensuring consistency in all aspects of external communications.

COMMUNICATIONS/PUBLIC RELATIONS

Market and advertise Albany Helping Hands and all owned businesses.

Create, edit, and update promotional material and publications (brochures, social media, electronic newsletters, donor correspondence, videos, etc.)

Prepare and distribute press releases.

Build positive relationships with stakeholders, media, local businesses, and the community.

Develop and maintain the organization's image and identity.

Conduct research, make site visits, and locate resources to help the Board and Fundraising Committee make decisions about fundraising opportunities.

Manage fundraisers.

Work with the Executive Director to create donor contribution letters.

GENERAL DUTIES AND RESPONSIBILITIES

Maintains strict confidentiality.

Follows all Albany Helping Hands service philosophies, policies, and procedures.

A team player who works collaboratively with others.

Performs other duties as requested.

TRUDY FIELDS

5050 COLUMBUS ST. SE #91, ALBANY OR 97322

Poltrudy@yahoo.com

SKILLS

- Work history with Excel, Word, and Outlook.
- Industry specific software: Fiserv programs, Navigator, Director, Great Plains, Access Manager and BPM.
- Office equipment: Sharps machines, coin counters, currency counters, cash advance machines, postage meters and copiers/scanning machines.
- Flexible and Adaptable.
- Independent and collaborator.
- Effective communication.
- Leadership and management.
- Time management.
- Troubleshooting.
- High standard of work ethics.

EXPERIENCE

[FINANCE MANAGER](#), ALBANY HELPING HANDS (2021 – CURRENT)

Entrusted with all aspects of the financial management of a non-profit including, accounts payable, accounts receivable, daily balancing, deposits, invoicing, reconciliation, budgeting, and fundraising.

[CUSTOMER SERVICE REPRESENTATIVE](#), WILLAMETTE COMMUNITY BANK (2018 – 2021)

Provided award-winning customer service while accurately and efficiently processing transactions (97% balance record)

Wires, international currency, new accounts processing and personal information updates.

Ordering and selling cash with the Federal Reserve, certifications, balancing, and audit preparation.

[STAFF ACCOUNTANT](#), COASTAL FARM AND RANCH (2016 – 2017)

Processing accounts receivable, accountants payable, prepaid expenses, fixed assets, and monthly, quarterly, and year-end general ledger certifications and audit preparations.

Improved processes for several duties to increase productivity and accuracy.

[ACCOUNTING SPECIALIST](#), CENTRAL WILLAMETTE COMMUNITY CREDIT UNION (2012 – 2016)

Balancing all aspects of cash (checks, cash advances, ach and currency).

Processed monthly and year-ending ledger certifications and audit preparations.

Streamlined procedures to ensure accuracy and efficiency for general ledger.

EDUCATION

BA BUSINESS ADMINISTRATION (FINANCE), OREGON STATE UNIVERSITY (JUNE 1992)



Request for Applications (RFA): Community Development Block Grant Activities

Applications Due by 5:00 p.m. Thursday, January 19, 2023 (PST)

333 Broadalbin Street SW, PO Box 490, Albany, Oregon 97321-0144 | Planning 541-917-7550

EXHIBIT A: APPLICATION

5.1 Applicant Information

Applicant (organization name): Boys & Girls Club of Albany

Contact Person: Samantha Jordan Email: sam@bgc-albany.org

Mailing Address: 1215 Hill St. SE, Albany, OR 97322

Phone #: 541-926-6666 Agency website: www.bgc-albany.org

UEI #: N1F6E1Z6B2A8 EIN: 93-0549842

Organization Mission Statement:

Our mission is to provide a safe, supervised environment for recreational and educational activities where all boys and girls, especially those who need us the most, can develop self-esteem and the qualities needed to become caring, responsible citizens. We offer programs aligning with the developmental needs of all young people: character and leadership development; education and career development; health and life skills; the arts; sports, fitness and recreation.

5.2 Proposal Summary

Activity/Program Name: Summer Program Scholarships for Kids

Activity Location: Boys & Girls Club of Albany, 1215 Hill St. SE, Albany, OR 97322

Proposal Summary: *Provide a summary of the proposed activity and anticipated outcomes.*

Aligned with the City's priorities to address anti-poverty strategies, childcare needs, services for children and teens, our out-of-school care summer care will focus on providing resources and support for vulnerable, at-risk children and families and Albany's low- and moderate-income resident's children by opening our doors so that families may work. We will ensure children are fed meals and nutritious snacks to further help curb costs for parents while ensuring youth facing food insecurity have daily nourishment, especially during the summer months when free school meals are not an option. There is still a critical need for academic and social-emotional support and enrichment in the aftermath of COVID-19 as our local Greater Albany School District youth served at the Club were still lagging behind in reading and math. Local parents share an ongoing need for affordable childcare among low and moderate income families. By providing scholarships for low-income families, we can provide a safe, nurturing environment with healthy snacks and nourishing meals to help close gaps for children academically and emotionally while helping parents/caregivers maintain jobs during summer months and to meet other basic budgetary needs. Our project will serve 135 low to moderate-low income, vulnerable Albany, school age children and their families in need of affordable childcare during the summer.



Request for Applications (RFA): Community Development Block Grant Activities

Applications Due by 5:00 p.m. Thursday, January 19, 2023 (PST)

333 Broadalbin Street SW, PO Box 490, Albany, Oregon 97321-0144 | Planning 541-917-7550

ACTIVITY BUDGET FOR WHICH CDBG FUNDS ARE BEING REQUESTED:

CDBG Funding Request	\$	\$51,591
Leveraged Funds/Resources	\$	\$79,629
Total Activity Budget	\$	\$131,220



5.3 CDBG Application Narrative

Provide the information requested below **in a separate document** making sure the narrative corresponds to the numbers provided so the required information can be easily found to ensure a complete application. If the question does not apply to the proposed project write N/A.

Activity Description

1. Explain which priorities in Albany's 2023-2027 Consolidated Plan will be addressed by the activity.
2. Describe the community need that will be addressed by the proposed activity.
3. Explain how the activity is an effective strategy to address the identified gap in needs. Provide statistics or evidence to document the activity need.
4. Please specify which CDBG National Objective(s) will be satisfied by the proposed activity.
5. Explain how the project will promote inclusiveness and diversity. Include your agency's nondiscrimination policy for employees and clients as an attachment.
6. For faith-based organizations, explain how your agency will ensure CDBG funded activities are separate from explicitly religious activities such as worship, study of religious text, or evangelizing.

Benefit to low-income Albany residents

7. Who and how many will benefit from activity (estimate # of people, describe clients)?
8. Of these, how many are estimated to be extremely low-income (earning <30% of area median)? Is there any special emphasis on serving extremely low-income residents?

Scope of Work

9. Provide a **DRAFT SCOPE OF WORK** that outlines details about the proposed activity including all actions that will be taken to address the identified need and achieve anticipated performance measures and outcomes, and general accomplishments you intend to achieve with this activity.

Project Feasibility – Readiness to proceed

10. Please describe your readiness to proceed, whether land use or other issues are resolved and whether your organization has the administrative capacity to complete the proposed project. Describe the current organizational capacity to complete and manage the activity within the program year.
11. Please complete the schedule that follows or provide one that is applicable to the activity/project that outlines when major activities will be executed and when the project will be completed.

Organizational Capacity and Activity Sustainability

12. Describe experience and success conducting similar projects, use of federal or CDBG funds.
13. If any issues were raised during a federal program monitoring evaluation, please explain the findings and how issues were resolved.
14. Explain agency experience managing construction projects subject to Davis-Bacon and/or BOLI wage requirements and/or soliciting bids for construction projects.
15. Identify any other agencies or partners for this activity/project and define the roles and responsibilities of these partners.
16. Please explain how the agency embraces and demonstrates diversity within the organization.
17. If not fully funded, will the agency be able to pursue the activity/service (possibly at a reduced scale)?

Financial

18. Why are CDBG funds the best fit/source? Are there other sources of funding for this activity?



Request for Applications (RFA): Community Development Block Grant Activities

Applications Due by 5:00 p.m. Thursday, January 19, 2023 (PST)

333 Broadalbin Street SW, PO Box 490, Albany, Oregon 97321-0144 | Planning 541-917-7550

5.4 Proposed Activity Budget

Provide the activity budget describing total cost, cost per task, existing (secured) project funds and unfunded costs. (DO NOT PROVIDE THE FULL AGENCY BUDGET HERE JUST THE ACTIVITY BUDGET.) Identify any and all source(s) of funding. This would include other Federal and State grants and loans, monetary donations, in-kind contributions, volunteer labor, donation of materials and supplies, etc. **Use the template provided below or your own as long as the same information is provided.**

Activity/Project Budget Summary (See 24 CFR 570 Subpart J)			
Estimated Total Cost of Activity:	\$131,220 factored at \$972/child =true cost/child x 135		
CDBG Funding Requested for Activity:	\$51,591		
Total Number of People/Households Served:	135		
Total Cost per Person/Household:	\$500/person over 10 weeks		
Total CDBG Cost per Person/Unit	\$250/person over 10 weeks		
Describe Source of Other Funds:	Amount	Amount Secured	Amount Tentative
Federal:			
State:			\$32,159
Local:			
Donations/Private:		\$2,470	
Grants:		\$45,000	
Loans:			
Activity Budget Detail (Non-Development Activities)			
Specific Cost Item/Description	CDBG Amount Requested	Other Funds Amount	Total Amount CDBG + Other Sources
Personnel: Mentors	\$33,500	\$48,021	\$81,521
Supplies:	\$250	\$24,750	\$25,000
Direct Support to Youth	\$17,841		\$17,841
Indirect Expenses: Evaluating, Supervision, Reporting, Oversight		\$6,858	\$6,858
			\$
Total	\$51,591	\$79,629	\$131,220



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5.5 Staff Experience and Qualifications

Identify the names of staff or contractors participating in the proposed program or activity, their role, experience they have in this role, their title, and the expected FTE on the project. **Include in an attachment resumes for key personnel anticipated to work on the proposed program, project, or activity.** Please make sure to identify the person responsible for collecting program performance data and preparing the quarterly reports for the City.

Employee	Experience and Qualifications
Name: Samantha Jordan Title: Director of Program Development	*Samantha will be responsible for collecting program performance data and preparing the quarterly reports to the City. With a B.S. in Elementary Education from Linfield College, Samantha directs the entire program operations. After a stint as a teacher for the Greater Albany School District, Sam has served as the Program Development Director since 2013. She thrives as a team leader working well with others, encouraging her team to guide youth development. With strong organizational skills and attention to detail, Sam has overseen countless grants, contracts and works diligently to exceed grant expectations with her team. She is an asset to the Club program and to the children of Albany.
Name: Rachel Troyer Title: 1 st -3 rd Grade Club Director FTE on This Project:98%	Rachel began her career as a Behavior Specialist/SEA Support with the Greater Albany School District from 2016-2019 after helping lead weekly youth nights for teen from 2011-present. She started at the Boys & Girls Club in 2014 as an Art Room Lead Youth Development Professional and served in multiple capacities from teen program coordinator to membership services coordinator before landing as the 1 st and 2 nd Grade Club Director in 2021 where she leads hundreds of children, volunteers and staff in facilitating and achieving youth development outcomes.
Name: Ricki Taylor Title: 4 th -5 th Grade Club Director FTE on This Project: 98%	Ricki has worked her way up the Boys & Girls Club movement by starting as an Assistant in 2016 helping a Lead staff implement activities with youth, becoming a Lead staff in 2017 running programs and activities, excelling in her position and becoming a Program Coordinator in 2018 with the responsibilities of training staff, working with kids and parent, becoming an Assistant Director in 2020 creating schedules and adding in administrative tasks, then becoming the 3 rd -5 th Grade Director working with staff, members, parents and the community and performing all responsibilities. Ricki is effective at communication, organizational skills, the ability to work under pressure and she is a strong leader.



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<p>Name: Cameron Kennedy</p> <p>Title: Teen Club Director</p> <p>FTE on This Project: 98%</p>	<p>Originally, a Club member himself, Cameron started as part of the teen employment program, in 2016, and was named the Teen Staff of the Year in 2019. He has completed progress towards his AAOT at Linn Benton Community College. He has worked as a youth development professional since 2016, he was hired as the Teen Club Director in January of 2022. He is skilled at both knowing the needs and interests of teens as well as ensuring Club youth are mentored in safe environments with skills in creating fun, engaging programs, mediating, coordinating, and ensuring the safety of youth.</p>
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CDBG Application Narrative

Activity Description

1. Explain which priorities in Albany's 2023-2027 Consolidated Plan will be addressed by the activity.

The priorities aligned with Albany's 2023-2027 Consolidated Plan that will be addressed by our activity include addressing the Anti-poverty strategy, Childcare Needs, Services for Children, and as secondary goals, Services - Health (free dental, mental health), and narrowing the digital divide for low-income youth.

Our Out-of-School care will focus on providing resources and support for vulnerable, at-risk children and families and Albany's low-and moderate-income residents' children.

2. Describe the community need that will be addressed by the proposed activity.

Our project will focus on low income Albany households with children and youth in need of out-of-school childcare, nutrition, academic and social emotional support and enrichment as well as the secondary goals of providing health services through free dental and mental health support and narrowing the digital divide for low-income youth with access to technology at the Club.

Anti-poverty strategies to help our community include providing low-cost childcare so parents/ caregivers can work while their children are cared for in a safe, nurturing environment. Local youth not only frequently face food insecurity at a rate of 23.3% but also lack food high in nutrients such as fresh fruit and vegetables, and choose to lead sedentary lifestyles, leading to chronic health problems such as obesity, diabetes, or high blood pressure. Part of our strategy includes hunger abatement efforts, especially in light of the higher food costs with inflation, by providing free meals and healthy snacks. Nutrition needs are paired with our Healthy Habits component that teaches youth how to increase fitness activity and learn about nutritious, affordable food and opportunities to increase fitness activity.

There is still a critical need for academic and social emotional support and enrichment in the aftermath of COVID-19 as children are behind and still struggling. By the end of the 2021 school year, youth were an average of five months behind in math and four months behind in reading across the country.

Local parents share a need for affordable childcare among low and moderate income families.

In 2021, the U.S. Surgeon General flagged youth mental health as a public health crisis with increased depression, anxiety, feelings of loneliness, and a drastic increase in suicidal ideation. One in five youth have increased signs of anxiety, and one in four youth have clinically elevated symptoms of depression. Boys & Girls Club of America 2022 youth data shows that the majority of youth (71%) say when something important goes wrong in their life, they can't stop worrying about it and that they try to keep people from finding out. Club mentors and normalizing conversations around mental health is key to ensuring youth have the emotional, social and mental support they need.

3. Explain how the activity is an effective strategy to address the identified gap in needs.

Provide statistics or evidence to document the activity need.

Nationally, one in five children do not have someone to care for them after school or during the summer. Every parent wants a safe, affordable place to send their kids after school with the peace of mind knowing they are under the guidance of caring, professional staff members. The Club offers a variety of tested, proven and nationally recognized programs to empower kids to excel in school, become good citizens and lead healthy, productive lives, often changing the trajectory for positive futures by helping close the opportunity gap for low-income, vulnerable youth.

One in three young people in the U.S. will reach the age of 19 without having a mentor of any kind. Trained Club youth development experts empower kids through mentoring and help bridge the kids from school to home, positively impacting youth, improving academic skills. Young people who meet regularly with a mentor are 40% more likely to graduate on time and 55% more likely to enroll in college. Club alumni report that 80% said the Club had a positive impact on their health and fitness and 85% of youth reported doing things to help people in their community thanks to the Club fostering good character and citizenship.

The Boys & Girls Club cares deeply about local hunger and good nutrition, as children need healthy food as fuel to learn and grow, and we want to help close disparities so that everyone has equitable opportunities and outcomes, regardless of race, gender, or geography. Especially during the summer, the Club's site-based meals programs serve a critical need in our community as many youth depend on Club meals as their only nutrition of the day. The Club has a unique opportunity to capitalize on the after school hours filling food nourishment gaps by providing daily free after school meals and healthy snacks, promoting healthy habits for eating and movement, while teaching children about the importance of eating a well-balanced, nutritious diet and the need for increased daily fitness habits and mental health strategies that are gleaned through physical fitness. It's critical to nurture mental health and address any mental or emotional health concerns early by equipping youth with the skills they need to manage their emotions and build resiliency so they can engage in every opportunity that comes their way. According to the U.S. Surgeon General's Advisory, 50% of all lifetime cases of mental illness begin by age 14 and 75% by age 24.

4. Please specify which CDBG National Objectives will be satisfied by the proposed activity.

Benefit to low- and moderate income (LMI) persons and meeting urgent needs because existing conditions pose an immediate threat to the health or welfare of the community.

Scholarship participation will mandate that information on family size and income determines that at least 70% of the clientele are persons whose family income does not exceed the L/M income limit. Ideally, the child care provided will allow the low-income family to be employed while their child/children are cared for during out-of-school time.

5. Explain how the project will promote inclusiveness and diversity. Include your agency's nondiscrimination policy for employees and clients as an attachment.

We must address challenges facing marginalized families with cultural agility and sensitivity, an awareness of systemic inequities, and approach promotion and outreach to underserved populations to include Latinos, African Americans, refugees, underrepresented ethnic groups, rural communities, low-income families, historically disadvantaged people, LGBTQ, and anyone facing health disparities. For those who perceive our programs as inaccessible, we must ensure inclusivity and work to empower youth and their families to receive access and equitable opportunities. By providing scholarships, we will remove barriers to participation for all.

**Below is our agency's diversity statement.*

6. N.A. (not a faith-based organization)

Benefit to low-income Albany residents

7. Who and how many will benefit from activity (estimate # of people, describe clients)

This project serves 135 low to moderate-low income, vulnerable Albany school-age children and their families in need of affordable childcare during the summer with 135 low-income children receiving scholarships at \$25/week for 10 weeks. Additionally, all children served will receive free daily breakfast, lunch and a healthy snack to help with food insecurity challenges. The Club can provide immediate and near-term relief efforts for families in need in an effort to provide essential

support and care to children of low-income families who need us most, leading to a safe, resilient community. The Club's true cost for one child to attend the Club is valued at \$972.00.

8. Of these, how many are estimated to be extremely low-income (earning <30% of area median)? Is there any special emphasis on serving extremely low-income residents?

Specific to this project, we will strive to focus on serving extremely low-income residents for the scholarships for summer with 70% as extremely low-income.

Scope of Work

9. Provide a draft scope of work that outlines details about the proposed activity including all actions that will be taken to address the identified need and achieve anticipated performance measures and outcomes, and general accomplishments you intend to achieve with this activity.

Safe club settings provide a place for kids to receive child care during out-of-school time and to help keep our community safe and prospering, allowing parents time to work knowing their children are cared for during the summer and after school.

Supervision from trained, caring adult mentors is provided daily in an ongoing and intentional way as measured by mentors. The mentoring deepens youth interests, sparks their curiosity in future career fields, helps youth deal with challenges and supports youth explore their full potential with guidance and encouragement.

We help close existing educational opportunity and achievement gaps for underserved students by providing daily academic support through tutoring, Project Learn, goal-setting and growth mindset strategies. This strategy leads to essential support for kids and families who need it most to help tackle the unfinished learning as a result of the pandemic.

Free Meals for hunger abatement provided daily as well as nutritious snacks. During summer breakfast and lunch are provided with a snack. During the school year supper and snack are provided.

Youth are constantly faced with health and behavior choices that can impact their future self and others. Mentors and small group settings guide youth to make healthy decisions centered on physical and emotional wellness rooted in good judgement, which is taught daily.

Ongoing Social Emotional Development learning and Mental Health Supports as needed, provided at the Club thanks to a partnership with the Old Mill Center.

When every young person has access to out-of-school time opportunities, when they're safe and healthy, and when they have essential skills, the Club can ensure equality and inclusion. Staff are provided with training and resources to ensure young people who are frequently marginalized or overlooked can be included and supported at the local Club.

Free onsite dental services for children and teens through the Club's free children's dental clinic and referrals for other dental, vision, and medical needs.

Access to the Club's three state-of-the-art technology centers helps narrow the digital divide for low-income youth by providing high-speed internet, new technology and resources such as software and equipment (printers, 3D printers) to learn 21st century technology skills.

Project Feasibility Readiness to Proceed

10. Please describe your readiness to proceed, whether land use or other issues are resolved and whether your organization has the administrative capacity to complete the proposed project. Describe the current organizational capacity to complete and manage the activity within the program year.

We are ready to proceed and we have the administrative capacity to complete the proposed project. Our **Chief Professional Officer**, John Andersen, has an Executive Masters in Business in Nonprofit Management from the University of Portland and a Bachelors Degree in Psychology from Washington State University. He has 21 years of experience in youth programming, is a certified national BGCA trainer and a member of the BGCA Academy. He has experience managing grant

programs to include preparing reports. He believes strongly in actively collaborating with nonprofit agencies, universities, community groups, city officials, school administrators, local businesses and community leaders in an effort to expand program services and ensure sustainability.

Our Club is governed by a team of Board of Directors from Linn County who acts as a trustee of our organization's assets; exercise due diligence to ensure that the Club is well-managed; use reasonable care to not place the organization at risk; monitor the results of financial goals and initiatives; oversee operations and finances of the organization; and provide advice and governance. The Board serves as the decision-makers of the organization and set the tone, providing direction for management. Management's responsibility is to carry out the decisions of the Board through day-to-day operations and to provide metrics for measuring success. Program managers oversee fundraising, administration and program operations. Although autonomous as a local Club, we receive guidance and resources from the Boys & Girls Club of America. Our organizational resources are aligned with our day-to-day operations in that the focus is first and foremost on meeting the needs of the youth that we serve. More than 80% of the resources are dedicated to direct programming for youth.

The Boys & Girls Club of Albany's strength has been defined by providing a safe place with caring adult mentors, and high-impact youth development programs targeting priority outcomes for the past 56 years. Our organization's history and experience, scale, and scope, position us to become the service leader and advocate for young people. Professionally trained staff and volunteers of diverse backgrounds, facilitate activities with consistent mentorship to youth when youth are at the greatest risk of negative influences.

11. Please complete the schedule that follows or provide one that is applicable to the activity/project that outlines when major activities will be executed and when the project will be completed.

The project will be completed between July 1 - 2023 - June 30, 2024.

Organizational Capacity and Activity Sustainability

12. Describe experience and success conducting similar projects, use of federal or CDBG funds.

Our **Director of Program Development, Samantha Jordan**, is a certified teacher with over nine years of Club leadership experience. Sam is supported by an experienced, dynamic, and dedicated management team, eager to improve upon basic established programs while looking for ways to deepen the impact and work more effectively. Sam has successfully overseen countless grants and ensures that her program team are aware of all grant expectations from the onset, adhere to all implementation requirements, and report on all aspects of grant programs in a timely fashion. She excels in her organizational skills and her abilities to motivate and inspire her team of staff, who produce great results under her guidance. She has created effective systems to track membership participation, mentoring, recruitment of mentors, and the financial expectations around Department of Justice federal funding, previous CDBG funds, and Oregon Department of Education and other pass-through funding from state and federal sources. She works in unison with the Club's fiscal manager and the two have the execution, tracking, and reporting process down to a science, grasping all expectations and excelling in the tracking of required details.

Senior Fiscal Manager, Kristi Pitts, completed her eighth year managing Federal Pass-Through Funding. Her organizational skills have propelled the BGC of Albany to the next level with her ability to track where individual funds for each grant are being spent and tracking the hours each staff

member work on individual grants. We have been fortunate to have her financial knowledge and attention to detail with grant fiscal reporting.

13. N.A. **If any issues were raised during a federal program monitoring evaluation, please explain the findings and how issues were resolved.**

14. N.A. (not a construction projects subject)

15. **Identify any other agencies or partners for this activity/project and define the roles and responsibilities of these partners.**

We partner with the **United States Department of Agriculture** providing meals and snacks relentlessly to children in need. During the school year, we provide daily Dinner and Snack program which offers each child a hot supper meal daily as well as an appropriate snack at the beginning of each after-school session. During the summer, a free breakfast, lunch, and snack are provided. We will work to outreach and target even more youth in the coming year, with the local hunger issue reaching a crisis level. This is facilitated with our state's **CACFP program** as well as the **Greater Albany School District**.

The **Greater Albany Public School District** collaborates with the Club on academic success initiatives for youth, provides free transportation to the Club daily, promotes engagement of students at the Club, encourages Club staff to attend school lunches for recruitment and support efforts weekly. We also partner with the **FACT - Families and Community Together** to help students and families in the Greater Albany School District access social services from food intervention, employment, and other support to increase protective factors to help ensure academic success.

A component of this project integrates social-emotional learning and access to mental health support through **Old Mill Center for Children and Families** that provides youth mental health assessments and guidance for behavioral, emotional and mental health, and counseling with onsite services at the Club six hours/week, along with trauma-informed training for staff and volunteers. **Linn County Health Department** is available for referrals of up to six visits per child for mental health challenges needing additional assistance and provides individual support as needed. Measures to boost mental health and well-being can be addressed through mentoring and Triple Play strategies as well.

Club staff are members of the collaborative **Youth Services Team (YST)** that serves as multidisciplinary teams to provide integrated services to youth in Linn County. These teams consist of agency staff from schools, social services agencies, law enforcement agencies, and other related community service providers. We work together to ensure that we are not duplicating services but rather providing opportunities to work together for the greater good of individual youth in need. Our purpose is to identify the needs of families who work voluntarily with this team of professionals to identify and arrange services through coordinated planning.

16. **Please explain how the agency embraces and demonstrates diversity within the organization.**

The Boys & Girls Club of Albany maintains a spirit and practice of inclusiveness, and seeks staff and board members who enrich our effectiveness and are reflective of our community through a diversity of experience, skills, cultures, and backgrounds. Our organization has a policy of equal opportunity for our staff and board, and does not discriminate in hiring, retention, promotion, board recruitment, partnerships, and communities served. Our organization defines diversity as individuality. This includes a wide spectrum of attributes that include: race, gender, age, ethnic heritage, culture, sexual orientation, language, family, religion, disability, education, and socio-economic circumstances.

We strive to hire staff that reflects the community we serve with special emphasis on focusing on recruiting and retaining diverse backgrounds. Our executive director represents a traditionally underserved population in ethnicity and as an immigrant whose family navigated poverty, discrimination, and challenges. We continue to try to recruit Board members who reflect the membership and prospective future members.

17. If not fully funded, will the agency be able to pursue the activity/service (possibly at a reduced scale)?

Yes, if not fully funded, we will pursue the activity and service but many low-income families may slip through the cracks in receiving the Club service without scholarships to reduce or cover their children's participation fees. Less low-income families would benefit without funding.

Financial

18. Why are CDBG Funds the best fit/source? Are there other sources of funding for this activity?

Providing scholarships for low-income families is a perfect fit for the CDBG funds that we cannot get from other funding streams such as foundations as many specify that they do not want to fund "scholarships" per se. The fit with the City funds allows working, yet low-income families struggling to pay their bills with the ability to have their children cared for during the summer days when they would have normally been in school's care in an **anti-poverty strategy**. Low-income families also save on food costs as their children receive breakfast, lunch and nutritious snacks at the Club during the summer months. This may be the only nutritious meals hungry kids are getting during the summer.

***Diversity Statement**

We believe that diversity is critical in our Club environment as it provides a variety of experiences and perspectives that arise as a result from differences in race, culture, religion, mental or physical activities, heritage, age, gender, sexual orientation, gender identity or other characteristics. The Club accepts any youth in grades Kindergarten through 12th grade despite any race, color, national origin, religion, sex, gender, pregnancy, physical or mental ability, medical condition, ancestry, sexual orientation, citizenship or relationship status. We value and affirm that diversity contributes to the richness of our Club's community and enhances each life with exposure to different perspectives on life, leading of mutual respect and the understanding of fellow humankind.

We strive to hire a diverse workforce and to help Club members feel accepted at the Club, we strive to hire a staff population that reflect the community we serve and to recruit board and volunteers to reflect our community as well.

Boys & Girls Clubs have an important role to play in the national call for action on racial injustice and equity. We recognize the impact of systemic racism on the lives of youth, and we believe young people should feel safe, have access to opportunities and feel valued not just at the Club, but everywhere in society. Our mission compels us to support youth in reaching their full potential, which includes identifying and helping to eliminate barriers that prevent the full participation and advancement of some groups in this country, particularly Black, Brown, Indigenous, and other persons of color.

Taking the lead from our national organization we are doing our part to combat racism and inequity through the experiences we provide to young people, the way we lead our organizations, and how we elevate issues that matter for kids and teens. Our Youth for Unity project serves as a starting place for discussing bias focusing on theme areas to include: Recognizing Bias and Unfairness,

Taking Personal Leadership in Confronting Bias, and How to Talk to Teens About Traumatic Events. We are facilitating front-line youth development professional, board and executive-level conversations in regards to systemic racism and where we have failed and how we can address any biases.

We take a stand for the future of America's children. We condemn any act of racism or discrimination. We stand for safety, health, dignity, and equitable opportunity. We advocate for youth and encourage young people to harness the power of their voice. We believe all young people should be afforded the guarantee of fair treatment, access and opportunity. There are historically marginalized, underserved and underrepresented populations and systemic racism has a traumatic impact on young people. The essential work needed to dismantle oppressive and unjust systems is complex and will require intentional and decisive action of all staff, volunteers, youth, and board members resulting in a collective effort to create a future that is equitable and accessible to all.

Rachel Troyer

rachel.r.troyer@gmail.com

(541) 760-1730

Experience

Boys and Girls Club of Albany, Albany, OR

1st-2nd Grade Club Director

2021-Present

- Maintain close, daily contact with Club professional staff to interpret and explain organizational mission, program objectives and standards, discuss issues, and provide/receive information.
- Advise, counsel, and discipline Club members, as needed.
- Establish Club programs, activities and services that prepare youth for success and create a club environment that facilitates achievement of Youth Development Outcomes.
- Ensure a healthy and safe environment, including maintenance of facilities, equipment and supplies.
- Participate in the development, implementation, and monitoring of the Elementary Club's annual budget, ensuring that club-wide programs and activities are operated within established budgetary guidelines.

Membership Services Coordinator

2019-2020

- Oversee membership registration procedures both online and in person. Partner with parents, program directors, and admin to ensure accuracy and efficiency.
- Accurately count daily deposits, assist bookkeeper with payroll, and input purchase data into QuickBooks.
- Manage the usage of the facilities calendar and work with community organizations to schedule events in our facility.

Teen Program Coordinator

2016-2018

- Supervise a team of ten staff members who led programs with students grades 6-12.
- Communicate effectively with volunteers, staff, parents, and community members daily to provide updates and build strong relationships.
- Maintain close contact with the director about staff and programs to quickly resolve issues that arose.

Membership Pick-Up Lead (seasonal)

2016-2018

- Input membership data and payments into MTS and Microsoft Office to ensure accurate records.
- Primary point of communication to parents on behalf of directors and staff regarding daily operations for the Club's multitude of programs.

Youth Development Professional (Art Room Lead)

2014-2016

- Lead 100+ children and volunteers in the program area to ensure smooth execution of programs.
- Plan ten-week programs and implement age-appropriate science and art activities.

Memorial Middle School/Timber Ridge School

Behavior Specialist/SEA Support

2016-2019

- Supervise students with behavioral needs; partner with individual teachers to create structure and clear expectations for each student's success.
- Input detailed data accurately into SIS daily to ensure precise tracking of student progress and behaviors.

South Albany Community Church

Youth Group Lead/Volunteer

2011-Present

- Collaborate with youth pastor and church leadership to lead weekly youth nights for 15-25 students in grades 6-12.
- Organize and promote fundraisers for annual missions trips to support local communities in Mexico.

Education

South Albany High School, Albany, OR

- High School Diploma

Certifications

- CPR/First Aid Certified

Ricki Taylor

2730 7th ST Apt. #1 Albany, OR 97322

(503) 409-9952

Ricki.Taylor@bgc-albany.org

OBJECTIVE

To work in a setting where I can challenge myself and be a benefit to the community.

WORK EXPERIENCE

Boys & Girls Club – 3rd-5th Director

2021-Present

- Working with Staff, Members, Parents, and Community
- Administration Tasks

Boys & Girls Club – Assistant Director

2020-2021

- Creating Schedules
- Assisting the Director with any administration needs

Boys & Girls Club - Program Coordinator

2018- 2020

- Training new staff
- Working with kids and parents

Boys & Girls Club - Lead

2017 - 2018

- Run programs
- Run activities

Boys & Girls Club - Assistant

2016 - 2017

- Assist lead in everyday activities

EDUCATION

West Albany High School Graduated 2013

SKILLS

Effective Communication

Leadership

Conflict Resolution

Time Management

Organizational Skills

Ability to Work Under Pressure

References Upon Request

Samantha Jordan

541-990-4487

samij2@hotmail.com

WORK EXPERIENCE

Boys & Girls Club of Albany, Albany, OR

Program Development Director, 2013-Present

- Direct/manage the after-school and summer program
- Supervise elementary and teen Program Directors
- Oversee programs and activities being ran by staff
- Implemented and oversees the opening of a Club Satellite Site
- Develop, implement and monitor the Club's program budget
- Maintain close daily contact with Club staff (professional and volunteers), Club members and supervisors
- Develop and maintain relationships with parents, community leaders and organizations
- Work closely with the grant writer and Club employees to establish grants necessary for program and Club needs
- Maintain a comprehensive grant spreadsheet
- Prepares and submits grant proposals and reports required by foundations/corporate donors
- Assist with planning and fundraising Club events
- Solicited sponsorships from business owners, donors, and individuals
- Develop collaborative partnerships
- Responsible for implementing volunteer training
- Demonstrate ability to communicate effectively, including written and verbal
- Strong organization skills, interpersonal skills and attention to detail
- Thrives in a team environment and works well with others
- Ensures all complaints are resolved and handled in a professional manner

Visionary Mobile Corporation (VMC), Corvallis, OR

Marketing/Investor Relations, 2012-2013

- Helped create business/marketing plan for new software platform
- Lead investor and customer demos
- Represented VMC at large conferences and trade shows
- Organized conference and trade show schedule
- Managed investor portfolio and stock certificates

Greater Albany Public Schools, Albany, OR
***Physical Education/Substitute Teacher*, 2009-2012**

- Developed lesson plans and encouraged active participation, teamwork and a variety of skills for over 400 children in grades K-5
- Completed report cards for over 400 students
- Collaborated with colleagues and parents to resolve disciplinary issues of students, while instilling effective motivational systems to ensure positive behavior from the children
- Created a grade book based on student performance and behavior
- Adapted lesson plans for students with special needs
- Contacted and held conferences with parents/guardians
- Kept computer records of students' progress and behaviors during the year
- Wrote grants that allowed the school to receive PE equipment
- Experience in teaching students from multicultural backgrounds

COMMUNITY INVOLVEMENT

Youth Services Team (YST)

EDUCATION

LINFIELD COLLEGE, McMinnville, Oregon
B.S., Elementary Education, June 2008

References available upon request

Cameron J. Kennedy

*832 Belmont Ave SW Apartment 25
Albany, OR 97321
(541) 979-3560*

EDUCATION

- Linn Benton Community College
Completed 52 credits towards AAOT
- Graduated from South Albany High School in 2016

CHARACTERISTICS

- Positivity, efficiency, and honesty are very important to me in the workplace. I am sociable and always get along well with colleagues. Ensuring others that I am willing to help in any and every situation is a critical part of being an effective team member.

WORK EXPERIENCE

- Homegoods
October 2017 - January 2018
Duties Included; Unloading the incoming trucks and assisting customers.
- Boys and Girls Club of Albany
Youth Development Professional
August 2016 - June 2017, September 2018 - January 2022
Duties included; Ensuring club members are in a fun and safe environment, mediating argumentative situations, coordinating and running activities.
 - Teen Staff of the Year 2019
- Boys and Girls Club of Albany
Teen Club Director
January 2022- Present
Duties Include; Leading 6-8 staff. Ensuring programs are high quality. Ensuring safety of members. Creating staff schedules.

REFERENCES

Todd Reinhart	John Weaver	Doug Kern	Scott Withers
(541) 967-4522	(971) 246-1145	(541) 226-1955	(541) 404-5141
Ext. 1625	Family Friend	Family Friend	Former Supervisor
Former Advisor			

	Board Member	Current Employment	Executive Position
1	Borde, Gale	Carcraft Auto Appearance/Tom Tom Deli/Chevron	
2	Condrea, Abel	Edward Jones	
3	Cordle, Mindy	Cordle Construction	
4	Cutsforth, Tom	Retired	Treasurer
5	Draper, Bill	Oregon State University	
6	Edwards, Kim	Oregon Freeze Dry	
7	Goebel, Greg	Weatherford Thompson	
8	Grossman, Barb	Retired	
9	Hagerty, Stephanie	Samaritan Cancer Resource Center	
10	Harpole, Connie	Fishing Club of OR	Secretary
11	Harris, Heidi	Cabi Stylist	
12	Headrick, Lorri	Tradewinds Transportation	
13	Hesseltine, Molly	Knife River	
14	Jenks, Leslie	Retired	
15	Jordan, Brad	Jordan Jewelers	
16	King, Stephanie	Midway Plumbing	President
17	Knowles, Sean	Albany Box Company	
18	Liles, Tracy	Umpqua Bank	
19	MacHugh, Bill	Keller Williams	
20	McKay, Carrie	Retired	
21	Meeker, Arthur	Xtreme Grafx	
22	Minnick, Tami	Sheet Metal Solutions	
23	Pascone, John	Alb/Mill Economic Dev.	
24	Perlenfein, Brian	B&R Auto	
25	Perlenfein, Steve	AA Towing/Valley Overhead	
26	Price, Amy	Coldwell Banker Valley Broker	
27	Reid, Tim	Reid Veterinary	
28	Rice, Lisa	Mortgage Express	
29	Richter, Cindi	Selmet Inc.	
30	Rubesh, Shawn	Axis Electric	Vice President
31	Scariano, Chris	Edward Jones	
32	Shufeldt, Darek		
33	Silbernagel, Pam	Retired	
34	Stellmacher, Barb	Stellmacher Farms	
35	Still, Andrea	AK Carpet	
36	Street, Patty	Retired	
37	Vogt, Gordon	Vogt Insurance	
38	Walls, Evonne	Samaritan Health	
39	Weaver, Andy	Weaver Seed	

2023 Boys & Girls Club of Albany Organizational Budget

Expense

Salaries	1,923,187.03
Workers Benefit Fund Assessment	1,085.41
Federal Withholding	153,861.06
State Withholding	9,718.39
Employee Benefits	174,733.21
Professional Services	97,622.21
Administrative Expenses/Supplies	66,485.07
Liability Insurance	53,811.75
Fundraising Expenses	157,100.00
Athletic Expenses	86,550.00
Program Grade 1-12 Expenses	157,415.00
Program Satellite Site Expenses	34,700.00
Operations/Occupancy - 3 Facilities	203,607.00
Professional Development	12,000.00
Travel & Meals	2,400.00
Sales to the Public Expenses	5,000.00
Dental Program Expenses	79,895.00
In-Kind Expenses	270,180.00
Off-Site Facility Expenses	24,286.44
Depreciation Expense	371,418.96

Subtotal Expenses* **3,885,056.53**

**Add: Capitalized Expenditures* *150,000.00*

Total Expenses **4,035,056.53**

Income

Corporate/Business Contribution	275,100.00
Individual Contributions	985,900.00
Foundation Grants	883,800.00
Government Grants	110,750.00
Indirect Public Support/United Way	14,000.00
In-Kind Donation	270,180.00
Investments	15,000.00
Athletic Program Income	380,815.04
Program Grade 1-12 Income	112,310.00
Program Satellite Site Income	8,235.00
Sales to the Public Income	37,900.00
Dental Income	168,139.96
Other Income	78,144.00

Subtotal Income* **3,340,274.00**

**Add: Released from Restricted Assets
(Restricted Grants & Funding)* *150,000.00*

**Add: Depreciation Expense* *371,418.96*

Total Income: **3,861,692.96**

Boys and Girls Club of Albany
Profit & Loss Budget Performance
December 2022

	Dec 22	Budget	Jan - Dec 22	YTD Budget	Annual Budget	% of Budget
Ordinary Income/Expense						
Income						
4000 • Direct Business Contribution	36,435.00	43,750.00	279,250.57	342,583.93	342,583.93	82%
4100 • Direct Individual Contribution	244,095.00	174,000.00	949,606.70	945,594.42	945,594.42	100%
4200 • Foundation Grants & Giving	17,000.00	0.00	1,259,713.01	1,235,397.86	1,235,397.86	102%
4300 • Government Grants	7,322.91	20,600.00	521,171.98	573,429.88	573,429.88	91%
4400 • Indirect Public Support	119.68	875.00	16,565.41	12,793.86	12,793.86	129%
4500 • In-Kind Donation	85,555.06	58,625.00	296,348.48	302,855.61	302,855.61	98%
4600 • Investments	5,819.11	1,250.00	21,856.78	8,627.39	8,627.39	253%
5000 • Athletic Program Income	18,497.27	12,545.00	402,570.93	366,318.99	366,318.99	110%
5100 • Program 1-12 Income	719.83	1,453.28	323,815.36	108,438.08	108,438.08	299%
5200 • Program Satellite Site Income	388.33	370.00	2,804.98	3,730.00	3,730.00	75%
5300 • Sales to the Public	573.24	500.00	22,930.14	18,514.60	18,514.60	124%
5400 • Dental Income	1,480.33	51,637.00	126,815.02	181,111.91	181,111.91	70%
Total Income	418,005.76	365,605.28	4,223,449.36	4,099,396.53	4,099,396.53	103%
Gross Profit	418,005.76	365,605.28	4,223,449.36	4,099,396.53	4,099,396.53	103%
Expense						
6000 • Administration Compensation	53,479.46	61,209.17	352,213.18	359,014.47	359,014.47	98%
6090 • Dental Compensation	6,643.21	6,170.32	62,849.52	67,110.28	67,110.28	94%
6100 • Athletic Compensation	20,739.96	18,974.13	242,719.47	239,966.65	239,966.65	101%
6200 • Waverly Satellite Program	9,461.93	17,768.75	57,445.55	98,330.85	98,330.85	58%
6300 • Elementary Program Compensation	22,557.53	46,251.34	286,887.35	428,603.57	428,603.57	67%
6400 • Teen Program Compensation	16,667.07	28,282.58	168,733.76	226,731.91	226,731.91	74%
6500 • Fundraising Compensation	16,363.98	15,735.54	169,800.66	174,491.72	174,491.72	97%
6600 • Operations Compensation	5,362.98	5,866.58	53,255.90	58,207.11	58,207.11	91%
6700 • Payroll Taxes	11,118.94	12,549.48	107,506.01	125,942.86	125,942.86	85%
6800 • Employee Benefits	11,975.02	12,727.39	153,452.83	151,423.04	151,423.04	101%
6900 • Professional Services	4,066.50	4,961.00	88,005.60	96,284.81	96,284.81	91%
7000 • Administrative Expenses	16,790.11	10,750.00	69,878.53	59,443.63	59,443.63	118%
7100 • Insurance	6,824.95	6,095.69	45,126.00	47,885.48	47,885.48	94%
7200 • Fundraising Expenses	12,573.88	32,850.00	160,266.38	152,289.75	152,289.75	105%
7300 • Athletic Expenses	997.75	3,265.00	99,138.13	83,501.59	83,501.59	119%
7400 • Program 1-12 Expenses	7,424.43	14,590.00	113,445.90	139,115.19	139,115.19	82%
7500 • Program Satellite Site Expenses	1,796.60	8,350.00	11,220.74	40,269.84	40,269.84	28%
7600 • Operations Expenses	25,296.50	20,894.66	217,203.74	198,920.43	198,920.43	109%
7700 • Professional Development	0.00	0.00	9,024.04	11,799.00	11,799.00	76%
7900 • Travel	114.00	200.00	3,059.04	2,014.92	2,014.92	152%
8000 • Sales to the Public Expenses	658.42	50.00	6,921.54	5,827.87	5,827.87	119%
8100 • Dental Expenses	3,639.11	2,990.00	63,896.18	63,838.94	63,838.94	100%
8200 • In-Kind Expenses	85,555.06	58,625.00	272,647.56	280,709.00	280,709.00	97%
Total Expense	340,107.39	389,156.63	2,814,697.61	3,111,722.91	3,111,722.91	90%
Net Ordinary Income	77,898.37	-23,551.35	1,408,751.75	987,673.62	987,673.62	143%
Other Income/Expense						
Other Income						
5520 • Capital Campaign	20.00	20.00	240.00	240.00	240.00	100%
5530 • Miscellaneous Income	0.00	100.00	2,578.12	1,899.41	1,899.41	136%
5540 • Board Dues	-250.00	0.00	8,960.00	9,500.00	9,500.00	94%
5560 • Cash Over/Short	0.00	0.00	12.42	10.00	10.00	124%
5570 • Off-Site Rental Property	5,331.50	5,797.00	61,280.10	64,147.00	64,147.00	96%
Total Other Income	5,101.50	5,917.00	73,070.64	75,796.41	75,796.41	96%
Other Expense						
8500 • Gain/Loss on Sale of Assets	0.00	0.00	1,532.62	1,084.56	1,084.56	141%
8600 • Capital Expenditures	0.00	0.00	0.00	0.00	0.00	
8700 • Off Site Facility Expenses	4,474.14	1,463.55	25,980.45	21,212.10	21,212.10	122%
8800 • Bad Debt Write-Off Expense	0.00	400.00	188.00	2,988.00	2,988.00	6%
8850 • Miscellaneous Expense	535.94	100.00	1,338.69	1,324.75	1,324.75	101%
8900 • Depreciation Expense	30,951.58	30,951.58	371,418.96	371,418.96	371,418.96	100%
Total Other Expense	35,961.66	32,915.13	400,458.72	398,028.37	398,028.37	101%
Net Other Income	-30,860.16	-26,998.13	-327,388.08	-322,231.96	-322,231.96	102%
Net Income	47,038.21	-50,549.48	1,081,363.67	665,441.66	665,441.66	163%

Boys and Girls Club of Albany
Profit & Loss Budget Performance
November 2022

	Nov 22	Budget	Jan - Nov 22	YTD Budget	Annual Budget
Ordinary Income/Expense					
Income					
4000 · Direct Business Contribution	13,065.00	23,750.00	242,815.57	298,833.93	342,583.93
4100 · Direct Individual Contribution	5,011.90	28,000.00	705,691.70	771,594.42	945,594.42
4200 · Foundation Grants & Giving	0.00	15,000.00	1,242,713.01	1,235,397.86	1,235,397.86
4300 · Government Grants	9,391.59	14,600.00	513,849.07	552,829.88	573,429.88
4400 · Indirect Public Support	1,306.76	875.00	16,445.73	11,918.86	12,793.86
4500 · In-Kind Donation	0.00	625.00	210,793.42	244,230.61	302,855.61
4600 · Investments	4,035.02	1,250.00	12,288.27	7,377.39	8,627.39
5000 · Athletic Program Income	55,549.17	40,880.00	384,073.66	353,773.99	366,318.99
5100 · Program 1-12 Income	1,037.50	1,503.28	323,095.53	106,984.80	108,438.08
5200 · Program Satellite Site Income	408.33	370.00	2,416.65	3,360.00	3,730.00
5300 · Sales to the Public	5,323.21	1,000.00	22,356.90	18,014.60	18,514.60
5400 · Dental Income	6,590.33	1,637.00	125,334.69	129,474.91	181,111.91
Total Income	101,718.81	129,490.28	3,801,874.20	3,733,791.25	4,099,396.53
Gross Profit	101,718.81	129,490.28	3,801,874.20	3,733,791.25	4,099,396.53
Expense					
6000 · Administration Compensation	26,479.46	26,209.17	298,733.72	297,805.30	359,014.47
6090 · Dental Compensation	5,900.40	6,170.32	56,206.31	60,939.96	67,110.28
6100 · Athletic Compensation	21,894.87	20,134.13	221,979.51	220,992.52	239,966.65
6200 · Waverly Satellite Program	8,271.61	18,272.50	47,983.62	80,562.10	98,330.85
6300 · Elementary Program Compensation	19,484.64	47,258.84	264,329.82	382,352.23	428,603.57
6400 · Teen Program Compensation	14,752.39	22,862.58	152,066.69	198,449.33	226,731.91
6500 · Fundraising Compensation	14,754.92	14,235.54	153,436.68	158,756.18	174,491.72
6600 · Operations Compensation	5,702.79	5,866.58	47,892.92	52,340.53	58,207.11
6700 · Payroll Taxes	9,054.29	12,645.06	96,387.07	113,393.38	125,942.86
6800 · Employee Benefits	12,175.64	12,727.39	141,477.81	138,695.65	151,423.04
6900 · Professional Services	4,585.00	4,361.00	83,939.10	91,323.81	96,284.81
7000 · Administrative Expenses	3,030.63	4,000.00	52,189.79	48,693.63	59,443.63
7100 · Insurance	973.39	3,310.69	38,301.05	41,789.79	47,885.48
7200 · Fundraising Expenses	47,691.21	11,200.00	146,925.99	119,439.75	152,289.75
7300 · Athletic Expenses	14,805.21	3,625.00	97,306.51	80,236.59	83,501.59
7400 · Program 1-12 Expenses	10,906.49	17,590.00	101,639.25	124,525.19	139,115.19
7500 · Program Satellite Site Expenses	287.49	8,600.00	9,205.27	31,919.84	40,269.84
7600 · Operations Expenses	16,322.05	16,724.66	190,919.13	178,025.77	198,920.43
7700 · Professional Development	675.82	5,000.00	9,347.12	11,799.00	11,799.00
7900 · Travel	225.60	200.00	2,945.04	1,814.92	2,014.92
8000 · Sales to the Public Expenses	346.48	200.00	6,192.63	5,777.87	5,827.87
8100 · Dental Expenses	5,072.00	5,360.00	60,044.19	60,848.94	63,838.94
8200 · In-Kind Expenses	0.00	625.00	187,092.50	222,084.00	280,709.00
Total Expense	243,392.38	267,178.46	2,466,541.72	2,722,566.28	3,111,722.91
Net Ordinary Income	-141,673.57	-137,688.18	1,335,332.48	1,011,224.97	987,673.62
Other Income/Expense					
Other Income					
5520 · Capital Campaign	20.00	20.00	220.00	220.00	240.00
5530 · Miscellaneous Income	0.00	100.00	2,578.12	1,799.41	1,899.41
5540 · Board Dues	0.00	0.00	9,210.00	9,500.00	9,500.00
5560 · Cash Over/Short	2.00	0.00	12.42	10.00	10.00
5570 · Off-Site Rental Property	5,099.50	5,797.00	55,948.60	58,350.00	64,147.00
Total Other Income	5,121.50	5,917.00	67,969.14	69,879.41	75,796.41
Other Expense					
8500 · Gain/Loss on Sale of Assets	0.00	0.00	1,532.62	1,084.56	1,084.56
8600 · Capital Expenditures	0.00	0.00	0.00	0.00	0.00
8700 · Off Site Facility Expenses	4,189.84	1,463.55	21,506.31	19,748.55	21,212.10
8800 · Bad Debt Write-Off Expense	0.00	400.00	188.00	2,588.00	2,988.00
8850 · Miscellaneous Expense	-100.00	100.00	802.75	1,224.75	1,324.75
8900 · Depreciation Expense	30,951.58	30,951.58	340,467.38	340,467.38	371,418.96
Total Other Expense	35,041.42	32,915.13	364,497.06	365,113.24	398,028.37
Net Other Income	-29,919.92	-26,998.13	-296,527.92	-295,233.83	-322,231.96
Net Income	-171,593.49	-164,686.31	1,038,804.56	715,991.14	665,441.66

Boys and Girls Club of Albany
Profit & Loss Budget Performance
October 2022

	Oct 22	Budget	Jan - Oct 22	YTD Budget	Annual Budget	% of Annual Budget
Ordinary Income/Expense						
Income						
4000 · Direct Business Contribution	29,055.00	23,750.00	230,550.57	275,083.93	342,583.93	67%
4100 · Direct Individual Contribution	7,274.97	48,000.00	700,574.80	743,594.42	945,594.42	74%
4200 · Foundation Grants & Giving	0.00	40,000.00	1,242,713.01	1,220,397.86	1,235,397.86	101%
4300 · Government Grants	6,759.32	17,500.00	504,457.48	538,229.88	573,429.88	88%
4400 · Indirect Public Support	2,293.18	1,350.00	15,138.97	11,043.86	12,793.86	118%
4500 · In-Kind Donation	0.00	15,625.00	210,793.42	243,605.61	302,855.61	70%
4600 · Investments	10,026.77	1,250.00	8,253.25	6,127.39	8,627.39	96%
5000 · Athletic Program Income	49,770.42	26,680.00	328,524.49	312,893.99	366,318.99	90%
5100 · Program 1-12 Income	1,032.33	1,833.28	322,058.03	105,481.52	108,438.08	297%
5200 · Program Satellite Site Income	358.33	370.00	2,008.32	2,990.00	3,730.00	54%
5300 · Sales to the Public	1,219.50	2,900.00	17,033.69	17,014.60	18,514.60	92%
5400 · Dental Income	1,544.83	1,637.00	118,744.36	127,837.91	181,111.91	66%
Total Income	109,334.65	180,895.28	3,700,850.39	3,604,300.97	4,099,396.53	90%
Gross Profit	109,334.65	180,895.28	3,700,850.39	3,604,300.97	4,099,396.53	90%
Expense						
6000 · Administration Compensation	26,479.46	26,209.17	272,254.26	271,596.13	359,014.47	76%
6090 · Dental Compensation	5,238.00	6,170.32	50,305.91	54,769.64	67,110.28	75%
6100 · Athletic Compensation	18,206.96	21,481.64	200,084.64	200,858.39	239,966.65	83%
6200 · Waverly Satellite Program	7,556.82	18,272.50	39,712.01	62,289.60	98,330.85	40%
6300 · Elementary Program Compensation	19,759.72	47,258.84	244,845.18	335,093.39	428,603.57	57%
6400 · Teen Program Compensation	13,643.72	22,862.58	137,314.30	175,586.75	226,731.91	61%
6500 · Fundraising Compensation	14,645.30	15,735.54	138,681.76	144,520.64	174,491.72	79%
6600 · Operations Compensation	5,232.46	6,190.58	42,190.13	46,473.95	58,207.11	72%
6700 · Payroll Taxes	8,560.11	12,769.58	87,332.78	100,748.32	125,942.86	69%
6800 · Employee Benefits	12,513.63	12,727.39	129,302.17	125,968.26	151,423.04	85%
6900 · Professional Services	9,865.00	4,361.00	79,354.10	86,962.81	96,284.81	82%
7000 · Administrative Expenses	4,542.36	4,300.00	48,561.13	44,693.63	59,443.63	82%
7100 · Insurance	2,246.00	3,310.69	37,327.66	38,479.10	47,885.48	78%
7200 · Fundraising Expenses	5,388.20	10,700.00	98,776.79	108,239.75	152,289.75	65%
7300 · Athletic Expenses	3,690.10	6,075.00	82,416.84	76,611.59	83,501.59	99%
7400 · Program 1-12 Expenses	8,269.77	11,515.00	89,925.99	106,935.19	139,115.19	65%
7500 · Program Satellite Site Expenses	1,689.37	5,700.00	8,753.33	23,319.84	40,269.84	22%
7600 · Operations Expenses	17,386.68	16,249.66	172,827.03	161,301.11	198,920.43	87%
7700 · Professional Development	2,688.65	5,000.00	7,509.21	6,799.00	11,799.00	64%
7900 · Travel	673.04	200.00	2,644.44	1,614.92	2,014.92	131%
8000 · Sales to the Public Expenses	737.45	300.00	5,846.15	5,577.87	5,827.87	100%
8100 · Dental Expenses	5,294.83	5,310.00	54,962.20	55,488.94	63,838.94	86%
8200 · In-Kind Expenses	0.00	15,625.00	187,092.50	221,459.00	280,709.00	67%
Total Expense	194,307.63	278,324.49	2,218,020.51	2,455,387.82	3,111,722.91	71%
Net Ordinary Income	-84,972.98	-97,429.21	1,482,829.88	1,148,913.15	987,673.62	150%
Other Income/Expense						
Other Income						
5520 · Capital Campaign	0.00	20.00	200.00	200.00	240.00	83%
5530 · Miscellaneous Income	1,263.00	100.00	2,578.12	1,699.41	1,899.41	136%
5540 · Board Dues	0.00	0.00	9,210.00	9,500.00	9,500.00	97%
5560 · Cash Over/Short	0.00	0.00	10.42	10.00	10.00	104%
5570 · Off-Site Rental Property	2,281.50	5,797.00	50,849.10	52,553.00	64,147.00	79%
Total Other Income	3,544.50	5,917.00	62,847.64	63,962.41	75,796.41	83%
Other Expense						
8500 · Gain/Loss on Sale of Assets	0.00	0.00	1,532.62	1,084.56	1,084.56	141%
8600 · Capital Expenditures	0.00	0.00	0.00	0.00	0.00	
8700 · Off Site Facility Expenses	7,669.13	7,763.55	17,316.47	18,285.00	21,212.10	82%
8800 · Bad Debt Write-Off Expense	0.00	400.00	188.00	2,188.00	2,988.00	6%
8850 · Miscellaneous Expense	100.00	100.00	864.25	1,124.75	1,324.75	65%
8900 · Depreciation Expense	30,951.58	30,951.58	309,515.80	309,515.80	371,418.96	83%
Total Other Expense	38,720.71	39,215.13	329,417.14	332,198.11	398,028.37	83%
Net Other Income	-35,176.21	-33,298.13	-266,569.50	-268,235.70	-322,231.96	83%
Net Income	-120,149.19	-130,727.34	1,216,260.38	880,677.45	665,441.66	183%

EXHIBIT A: APPLICATION

5.1 Applicant Information

Applicant (organization name): Community Outreach Assistance Team (COAT)

Contact Person: Carol Davies Email: carol.davies@creatinghousing.org

Mailing Address: PO Box 892, Albany, OR 97321

Phone #: 802-461-5554 Agency website: <https://www.creatinghousing.org>

UEI #: PF8AUS4KFQP2

EIN: 83-4627390

Organization Mission Statement:

To reach out to those in need, treating them with dignity, respect, and compassion while providing them with basic necessities and resources

5.2 Proposal Summary

Activity/Program Name: COAT Success

Activity Location: Albany and the I-5 Santiam Rest Area

Proposal Summary: *Provide a summary of the proposed activity and anticipated outcomes.*

COAT is Creating Housing Coalition's outreach arm. We go out into the community four days a week and we serve unhoused and housing-unstable people, including people of color, LGBTQ+, Latinx, single parents with children, elderly, and individuals with disabilities. This grant will enable us to continue our outreach work by partially funding two peer support/outreach specialists, as well as their and the Director's travel-related expenses.

In doing this work, it has come to our attention that there is a gap in services for community members who need specific resources that aren't covered by any of the area agencies. Proceeds from this grant would create a "flex fund" to address those gaps.

ACTIVITY BUDGET FOR WHICH CDBG FUNDS ARE BEING REQUESTED:

CDBG Funding Request	\$	21,700
Leveraged Funds/Resources	\$	113,283
Total Activity Budget	\$	134,983

5.3 CDBG Application Narrative

Provide the information requested below **in a separate document** making sure the narrative corresponds to the numbers provided so the required information can be easily found to ensure a complete application. If the question does not apply to the proposed project write N/A.

Activity Description

1. Explain which priorities in Albany's 2023-2027 Consolidated Plan will be addressed by the activity.

COAT will address GOAL 4 in Albany's 2023-2027 Consolidated Plan, which is to provide Albany's special needs and low and moderate-income residents with needed public services by supporting service agencies that serve highly vulnerable and underserved populations such as unaccompanied youth, persons with disabilities, homeless, elderly, and agencies that further fair housing.

We serve all of the above populations, with an emphasis on the homeless population that are elderly and/or disabled.

2. Describe the community need that will be addressed by the proposed activity.

The unhoused and housing-unstable population in Albany has critical needs that COAT addresses. They include distributing food and supplies, giving community members information on services available, and providing assistance accessing those resources when appropriate.

Our team is often the first point of service contact, bridging connections to additional services such as shelter, housing, mental and physical health supports (including access to SUD services), and employment supports. Because of the trust we have built with people through nonjudgmental, inclusive services, our outreach team builds relationships with the people we serve. We learn about people's needs and goals and the barriers they face to service connections; we offer basic needs provision and provide education and harm reduction support; we communicate around camp postings; and we support coordinated entry with other agencies. We also make up and distribute hygiene and medical kits and we staff a laundry day at the local laundromat. With flex funds we'll also be able to assist with gas vouchers, pay for cabs for immediate transportation needs, purchase parts for inexpensive vehicle repairs, and pay for service charges for furniture when we're able to get folks into housing. We'll also employ harm reduction practices, which will include needle exchange and condom distribution.

3. Explain how the activity is an effective strategy to address the identified gap in needs. Provide statistics or evidence to document the activity need.

The onset of Covid halted fledgling efforts at outreach by other organizations. COAT filled the gap and brought supplies and resources to this underserved population. We supply food, water, and hygiene and medical supplies, among other necessities. Due to the harsh conditions of winter, many of the people we serve have inadequate outdoor clothing. We fill that gap by providing, jackets, hats, gloves, and socks, and we offer a way for them to dry their clothes by staffing one day a month in the Laundry Love program.

Most people we see for the first time are unaware of the services that Albany has to offer. We help them access those services, and for those who are unable to advocate for themselves, we provide intensive case management to get them needed services. To date, we've been directly responsible for getting 13 of these high-need individuals into permanent

housing. These have been the most vulnerable members of our community, and without our assistance, they would have suffered unnecessarily, and perhaps lost their lives.

Utilizing harm reduction principles and practices will serve four distinct purposes: (1) by offering a needle exchange program we'll cut down on the transmission of infectious diseases; (2) we'll be able to have increased access to substance users, thereby increasing the number of referrals we can make to treatment facilities; (3) by distributing condoms we can help prevent the spread of communicable diseases and reduce the number of unwanted pregnancies; (4) having a needle exchange program will significantly cut down on the incidence of used syringes being improperly disposed of.

We utilize a data tracking sheet to record the name of everyone we serve, along with their date of birth, the location of their campsite, where they are from, and how they identify. We also keep a record of the items we give them and the date that we do so. By doing this we can accurately measure which items are in the highest demand, as well as track the demographics of the clients we serve.

4. Please specify which CDBG National Objective(s) will be satisfied by the proposed activity.

Our outreach program addresses two of the CDBG National Objectives: Our program exclusively benefits low-income individuals, and it meets an urgent need in the community by distributing basic necessities such as food, clothing, heaters, tents, and sleeping bags to community members who are either living in their vehicles or rough camping. Furthermore, the proposed flex funds would fill a gap in services that aren't addressed by other agencies,

5. Explain how the project will promote inclusiveness and diversity. Include your agency's nondiscrimination policy for employees and clients as an attachment.

At COAT we believe in being respectful and responsive to each individual's cultural and linguistic needs. We understand that this response to beliefs, practices and the needs of diverse clients can help close the gap in outcomes and we are devoted to supporting those needs. We have board members trained in cultural competencies, racial equity, fair housing, CLAS, and restorative justice. Our leadership and staff are dedicated to learning and growing consistently. We not only practice these through our internal policies, procedures, and education but also by establishing diverse teams and measuring our efforts. Our leadership and staff are dedicated to practicing and promoting diversity, inclusion, and equity internally by everything mentioned in the above statement, as well as positively highlighting diverse stories within our own organization, creating mentorships, and creating policies and procedures by committees who embody equity, diversity, and inclusion. In our program we work in a diverse atmosphere daily, therefore we talk about it daily, and we make sure we are consistently growing and learning.

6. For faith-based organizations, explain how your agency will ensure CDBG funded activities are separate from explicitly religious activities such as worship, study of religious text, or evangelizing.

N/A

Benefit to low-income Albany residents

7. Who and how many will benefit from activity (estimate # of people, describe clients)?

We served approximately 400 unhoused and housing-unstable people in Albany and the surrounding area in the past year. Most of our clients are chronically homeless and have a disability, a current or previous substance use disorder, and/or face substantial social disparities due to transition from incarceration, lack of access to education, generational poverty, and orientation. Approximately 50% of our clients experience or have experienced a substance use disorder (SUD), and 75% of our clients identify as people with disabilities, which range from chronic physical health conditions to mental health conditions. Approximately 85% of our clients are White, and the remaining 15% are a mix of Black, Indigenous, Asian or Pacific Islander, and Latin(X). 95% are English-speakers and approximately 25% identify as LGBTQ+. We anticipate this number will increase due to the addition of another scheduled night for outreach.

8. Of these, how many are estimated to be extremely low-income (earning <30% of area median)? Is there any special emphasis on serving extremely low-income residents?

Over 95% of the people we work with are extremely low-income.

Scope of work

9. Provide a DRAFT SCOPE OF WORK that outlines details about the proposed activity including all actions that will be taken to address the identified need and achieve anticipated performance measures and outcomes, and general accomplishments you intend to achieve with this activity.

Project: Community outreach to residents who are experiencing homelessness or are housing-unstable.

Parties Involved: Staff and volunteers from COAT, staff from CHANCE

Scope of Work

- Staff and volunteers will attend multiple trainings throughout the year
- Order and maintain inventory of food, medical, hygiene supplies, camping supplies, and clothing
- Have teams go out to parks, parking lots, campsites, and public facilities such as laundromats and Bottle Drop
- Talk with community members to determine if and what kind of assistance is needed
- Inform community members of the services available in Albany, hand out resource cards, food, and supplies
- Offer needle exchange, Narcan, and Covid tests
- Offer case management (including intensive case management) for community members who are unable to advocate for themselves
- Provide assistance through flex funds for items or services that other agencies don't provide
- Record all interactions on data tracking sheets
- Coordinate and participate in Linn County's annual Point-In-Time count

Project Schedule: All activities will occur throughout the calendar year

Project Feasibility – Readiness to proceed

10. Please describe your readiness to proceed, whether land use or other issues are resolved and whether your organization has the administrative capacity to complete the

proposed project. Describe the current organizational capacity to complete and manage the activity within the program year.

COAT has all the necessary infrastructure in place to execute and complete this project. The building where our storeroom is located is owned by CHANCE and the storeroom is equipped with inventory. Our staff and volunteers have attended multiple trainings, including de-escalation techniques, harm reduction principles, mental health first aid, trauma-informed care, Narcan administration, and sexual harassment. Furthermore, one of our staff members is a certified peer support specialist, and the other staff member will attend a week-long training in February to become a certified peer support specialist. We'll be offering numerous other trainings throughout the year for both staff and volunteers.

Our Executive Director has been in this position since COAT's inception. She's a small business owner, with many years' experience founding and working on the board of directors of multiple non-profit organizations. She provides unhoused Albany community members intensive case management when they're unable to navigate the oftentimes confusing array of services available. To date, she has helped more than a dozen high-needs individuals find permanent housing. She's also responsible for grant writing and administration and budgeting.

Our volunteer coordinator is responsible for ensuring our two staff members have adequate support while on outreach. She is the first point of contact for people interested in volunteering, and she makes sure they complete the necessary training before they go on outreach. She currently oversees more than 15 volunteers.

11. Please complete the schedule that follows or provide one that is applicable to the activity/project that outlines when major activities will be executed and when the project will be completed.

Major activities will be executed on a continual basis throughout the year.

Organizational and Activity Sustainability

12. Describe experience and success conducting similar projects, use of federal or CDBG funds.

This project has been ongoing since December 2021. In this time, we grew from having one volunteer to our current workforce, which is composed of an Executive Director, two staff members, and 15 volunteers. To date, we've assisted over 400 people with food, supplies, resource referrals, and housing. Our funding has come from private donations and multiple grants from Community Services Consortium.

13. If any issues were raised during a federal program monitoring evaluation, please explain the findings and how issues were resolved. N/A

14. Explain agency experience managing construction projects subject to Davis-Bacon and/or BOLI wage requirements and/or soliciting bids for construction projects. N/A
15. Identify any other agencies or partners for this activity/project and define the roles and responsibilities of these partners.

CHANCE is our primary partner, providing us with space for our storeroom and staff for outreach. They also provide us with supplies and resources, as well as offering training opportunities. Community Services Consortium is our secondary partner, providing us with grant money to purchase food and supplies. Linn Benton FoodShare partners with us to provide food at reduced or no cost for distribution to community members. They also provide training opportunities. Jackson Street Youth Services partners with us, sharing resources and occasionally joining us on outreach. Family Assistance Resource Center Group shares resources and will be training us on Harm Reduction for the needle exchange program.

16. Please explain how the agency embraces and demonstrates diversity within the organization.

COAT embraces diversity by following non-discrimination practices in hiring people without regard to race, ethnicity, creed, gender, gender expression, sexual orientation or other-abled individuals. We're dedicated to practicing and promoting diversity internally by positively highlighting diverse stories within our own organization, creating volunteer opportunities, and creating policies and procedures that embody diversity, inclusion and equity. In our program we work in a diverse atmosphere daily, therefore we talk about it daily, and we make sure we are consistently growing and learning.

We demonstrate diversity in the 6-session training our Board of Directors is enrolled in on racial equity and by using our training to interact with more awareness regarding individual needs related to cultural, racial, and linguistic differences. We further demonstrate diversity by employing a hearing-impaired individual.

17. *If not fully funded, will the agency be able to pursue the activity/service (possibly at a reduced scale)?*

This work depends on the grants and support received through various sources. CDBG funds are vital and necessary for the work of COAT as this work directly answers the needs of the funding requirements and supports the purpose of these funds. Without these funds, more hours will be consumed seeking funding than serving the most vulnerable community members until that gap is filled.

Financial

18. Why are CDBG funds the best fit/source? Are there other sources of funding for this activity?

We're providing a crucial service to the City by reaching out to our poorest and most vulnerable community members and providing them with the basic necessities to survive so that they may be better able to access services, while supporting them on pathways to

housing stability. We reach people who otherwise might not seek assistance, and by doing so we reduce the strain to emergency services, which benefits the city financially.

Funding for street outreach is extremely competitive, with not enough funding available to adequately address the issue of homelessness and housing instability. That's why CDBG funding is so important to organizations like ours, who rely on entities on the local level to fund our programs.

5.4 Proposed Activity Budget

Provide the activity budget describing total cost, cost per task, existing (secured) project funds and unfunded costs. (DO NOT PROVIDE THE FULL AGENCY BUDGET HERE JUST THE ACTIVITY BUDGET.) Identify any and all source(s) of funding. This would include other Federal and State grants and loans, monetary donations, in-kind contributions, volunteer labor, donation of materials and supplies, etc. **Use the template provided below or your own as long as the same information is provided.**

Activity/Project Budget Summary (See 24 CFR 570 Subpart J)	
Estimated Total Cost of Activity:	\$134,983
CDBG Funding Requested for Activity:	\$21,700
Total Number of People/Households Served:	400
Total Cost per Person/Household:	\$338
Total CDBG Cost per Person/Unit	\$54

Describe Source of Other Funds:	Amount	Amount Secured	Amount Tentative
Federal:	N/A		
State:	N/A		
Local:	N/A		
Donations/Private:	1,700	1,700	0
Grants:	45,000	15,000	113,283
Loans:	N/A		
Activity Budget Detail (Non-Development Activities)			
Specific Cost Item/Description	CDBG Amount Requested	Other Funds Amount	Total Amount CDBG + Other Sources
Payroll	\$10,000	\$88,783	\$98,783
Food	5,500	0	5,500
Printing and Office Supplies	0	500	500
Outreach Supplies	0	16,000	16,000
Clothing	0	8,000	8,000
Flex Funds	5,000	0	5,000
Mileage Reimbursement	1,200	0	1,200
Total	\$21,700	\$113,283	\$134,983

5.5 Staff Experience and Qualifications

Identify the names of staff or contractors participating in the proposed program or activity, their role, experience they have in this role, their title, and the expected FTE on the project. **Include in an attachment resumes for key personnel anticipated to work on the proposed program, project, or activity.** Please make sure to identify the person responsible for collecting program performance data and preparing the quarterly reports for the City.

Employee	Experience and Qualifications
Name: Carol Davies Title: Executive Director FTE on This Project: 1.0	Vice President, Creating Housing Coalition; small business owner; BS in Human Services
Name: Heather Denherder Title: Lead Peer Support Specialist FTE on This Project: .8	Lived experience; AS in Human Services; Certified Addiction Peer Support Specialist
Name: Michael McCarthy Title: Peer Support Specialist FTE on This Project: .325	Lived experience
Name: Title: FTE on This Project:	



Request for Applications (RFA): Community Development Block Grant Activities

Applications Due by 5:00 p.m. Thursday, January 19, 2023

333 Broadalbin Street SW, Albany, Oregon 97321-0144 | BUILDING 541-917-7553 | PLANNING 541-917-7550

Exhibit B: REQUIRED CDBG CERTIFICATIONS

If this agency (name): Creating Housing Coalition is awarded funding, the agency agrees that:

1. The recipient has a DUNS # and is or will be registered in the U.S. System for Award Management at <http://sam.gov> before contract award and will update registration as necessary.
2. The recipient will provide liability insurance coverage as required by the City of Albany, and worker's compensation and payment of payroll taxes as required by Federal and State laws.
3. All expenditures must have adequate documentation and all accounting records and supporting documentation shall be available for inspection by City of Albany upon request, and funds will not be used to provide services/assistance for the same costs/losses from other funding sources.
4. All procurement (purchase) transactions regardless of whether negotiated or advertised and without regard to dollar value shall be conducted in a manner to provide maximum open free competition.
5. Financial records, support documentation, statistical records, and all other records pertinent to funding shall be retained for a period of ten years following completion of project/activity.
6. The recipient shall establish safeguards to prohibit employees from using their positions for a purpose that has the appearance of being motivated by a desire for private gain for themselves or others.
7. All materials submitted shall become public records retained by the City of Albany, except that late applications will be returned to the applicant without further review.
8. No person, on the basis of race, color, national origin, sex, gender identity, familial status, religion, disability, age, veteran status, or any other characteristic protected under applicable federal, state, or local laws should be excluded from participation in, be denied the benefit of, or be otherwise subjected to discrimination under the program or activity funded in whole or part by CDBG funds. The funding recipient agrees to furnish copies of applicable policies and procedures upon request.
9. Employment made by or resulting from CDBG funding from the City of Albany shall not discriminate against any employee or applicant on the basis of disability, age, race, color, religion, sex, or national origin.
10. None of the funds, materials, property, or services provided directly or indirectly under CDBG funding from the City of Albany shall be used for any partisan political activity, or to further the election or defeat of any candidate for public office.
11. Letter of commitment from other funding sources and/or letters of support for your project shall be furnished to the City of Albany upon request.
12. **Authorization to request funds:** I acknowledge the statements above and certify the information contained in this application is true and correct. I further understand material omission or false information contained in this application constitutes grounds for disqualification.

Signature

Carol Davies

Printed Name and Title

1/16/23

Date



Exhibit C: CONFLICT OF INTEREST CERTIFICATION

Applicant has no conflict of interests with any City of Albany appointed or elected representatives and does not employ City appointed or elected representatives or their families.

Conflict of Interest. The undersigned Applicant and each person signing on behalf of the Applicant certifies, and in the case of a sole proprietorship, partnership, or corporation, each party thereto certifies as to its own organization, under penalty of perjury, that to the best of their knowledge and belief, no member of the City Council, officer, employee, or person, whose salary is payable in whole or in part by the City, has a direct or indirect financial interest in the award of funds, or in the services to which this Application relates, or in any of the profits, real or potential, thereof, except as noted otherwise herein. The undersigned hereby submits this Application to furnish all services and activities as indicated in the Application submittal.

Furthermore, Applicant must disclose any real or perceived conflict of interest, current or past relationships with City of Albany employees, appointed or elected officials associated with this program.

Disclosure: No conflict of interest

SIGNATURE OF AUTHORIZED PERSON:
(notarization is not required)

The Applicant hereby certifies that the information contained in these certifications and representations is accurate, complete, and current.

Creating Housing Coalition 802-461-5554
Applicant's Agency Name Phone Number

Carol Davies 1/16/23
Signature Date

Carol Davies, Vice President
Printed Name and Title

Section 3 Business or Individual (check applicable box):

☐ Yes ☐ No

Disadvantaged, Minority, Emerging Small Business (DMESB) (check applicable box):

☐ Yes ☐ No



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Exhibit D: ANTI-LOBBYING STATEMENT

The anti-lobbying provisions will apply to any person who is an employee, agent, consultant, officer, elected or appointed official of the subrecipient that is receiving CDBG or CDBG-CV funds.

Applicant certifies that:

1. No Federal funds have been paid or will be paid, by or on behalf of the applicant agency, to any person for influencing or attempting to influence an officer or employee of the awarding of any Federal, state or municipal contract, the making of any Federal or municipal grant, the making of any Federal or municipal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment or modification of any Federal, state or municipal contract, grant, loan or cooperative agreement.
2. If any funds other than Federal funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any Federal or municipal agency/department, Member of Congress, an officer or employee of Congress, an employee of a Member of Congress, Mayor, City Council member, or employee of the Mayor or a City Council member in connection with this application, contract, grant, loan or cooperative agreement, it will complete and submit Standard Form-LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions; and
3. It will require that the language of paragraph 1 and 2 of this anti-lobbying certification be included in the award documents for all subcontractor awards at all tiers.

SIGNATURE OF AUTHORIZED PERSON:

(notarization is not required)


Signature

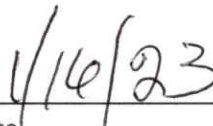

Date



EXHIBIT E - APPLICANT REPRESENTATIONS AND CERTIFICATION REGARDING DEBARMENT, SUSPENSION AND OTHER RESPONSIBILITIES

The Applicant certifies to the best of its knowledge and belief by initialing next to each statement that neither it nor any of its principals:

1. ☒ Are presently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from submitting bids or Applications by and federal, state or local entity, department or agency;
2. ☒ Have within a five-year period preceding the date of this certification been convicted of fraud or any other criminal offense in connection with obtaining, attempting to obtain, or performing a public (federal, state, or local) contract embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
3. ☒ Are presently indicted for or otherwise criminally charged with commission of any of the offenses enumerated in Paragraph 2 of this certification;
4. ☒ Have, within a five-year period preceding the date of this certification had a judgment entered against contractor or its principals arising out of the performance of a public or private contract;
5. ☒ Have pending in any state or federal court any litigation in which there is a claim against applicant or any of its principals arising out of the performance of a public or private contract; and
6. ☒ Have within a five-year period preceding the date of this certification had one or more public contracts (federal, state, or local) terminated for any reason related to contract performance or compliance.

If Applicant is unable to attest to any of the statements in this certification, Applicant shall attach an explanation to the Application. The inability to certify to all of the statements may not necessarily preclude the Applicant from award of a contract under this procurement.

SIGNATURE OF AUTHORIZED PERSON:

(notarization is not required)

Signature

Date

EXHIBIT F – CERTIFICATION OF INSURANCE REQUIREMENTS

All Subrecipients shall at all times maintain insurance in the coverage limits noted below at Applicant's expense.

Preferred limits below may be adjusted on a case by case basis.

Workers' Compensation insurance in compliance with ORS 656.017, which requires subject employers to provide workers' compensation coverage in accordance with ORS Chapter 656 or CCB (Construction Contractors Board) for all subject workers. Contractor and all subcontractors of Contractor with one or more employees must have this insurance unless exempt under ORS 656.027. **Employer's Liability Insurance with coverage limits of not less than \$1,000,000 must be included. If Contractor does not have coverage, and claims to be exempt, Contractor must indicate exemption below with qualified reasons for exemption, ORS 656.027.** Out-of-state Contractors with one or more employees working in Oregon in relation to this Contract must have Workers' Compensation coverage from a state with extraterritorial reciprocity, or they must obtain Oregon specific Workers' Compensation coverage ORS 656.126. ☐ Check this box if Contractor is exempt and provide qualified reason: _____

Professional Liability insurance covering any damages caused by error, omission or any negligent acts of the Contractor, its subcontractors, agents, officers, or employees' performance under this Contract. **Combined single limit per occurrence shall not be less than \$2,000,000. Annual aggregate limit shall not be less than \$2,000,000.** If coverage is on a claims-made basis, then either an extended reporting period of not less than 24 months shall be included in the Professional Liability insurance coverage, or Contractor shall provide **Tail Coverage**.

- ☐ If this box is checked, the limits shall be \$1,000,000 per occurrence and \$1,000,000 in annual aggregate.
☐ Required by City ☒ Not Required by City (Needs Finance Insurance Review and Approval.)

Commercial General Liability insurance with coverage satisfactory to the City on an occurrence basis. **Combined single limit shall not be less than \$2,000,000 per occurrence for Bodily Injury and Property Damage and annual aggregate limit for each shall not be less than \$3,000,000.** Coverage may be written in combination with Automobile Liability Insurance (with separate limits). **Annual aggregate must be on a "per project basis".** A combination of primary and **Excess/Umbrella insurance** may be used to meet the required limits of insurance.

- ☐ If this box is checked, the limits shall be \$1,000,000 per occurrence and \$2,000,000 in annual aggregate.
☐ If this box is checked, the limits shall be \$5,000,000 per occurrence and \$5,000,000 in annual aggregate.
☒ Required by City ☐ Not Required by City (Needs Finance Insurance Review and Approval.)

Automobile Liability covering all owned, non-owned, or hired vehicles. This coverage may be written in combination with the Commercial General Liability insurance (with separate limits). **Combined single limit per occurrence shall not be less than \$2,000,000.** Use of personal automobile liability insurance coverage may be acceptable if evidence that the policy includes a business use endorsement is provided.

- ☐ If this box is checked, the limits shall be \$1,000,000 per occurrence.
☐ If this box is checked, the limits shall be \$5,000,000 per occurrence.
☒ Required by City ☐ Not Required by City (Needs Finance Insurance Review and Approval.)

Pollution Liability covering Contractor's or appropriate subcontractor's liability for bodily injury, property damage and environmental damage resulting from sudden accidental and gradual pollution and related cleanup costs incurred by Contractor, all arising out of the Goods delivered or Services (including transportation risk) performed under this Contract is required. If this coverage is on a claims-made basis, the policy must provide a 24-month extended reporting period. **Coverage must have a limit of not less than \$2,000,000 per incident/claim and \$2,000,000 policy annual aggregate.**

- ☐ Required by City ☒ Not Required by City (Needs Finance Insurance Review and Approval.)

Sexual Abuse and Molestation for the duration of the contract and for the period of time in which Contractor is providing business services. **Coverage must include limits of not less than \$1,000,000.**

☐ Required by City ☒ Not Required by City (Needs Finance Insurance Review and Approval.)

Coverage must be provided by an insurance company authorized to do business in Oregon or rated by A.M. Best's Insurance Rating of no less than A-VII or City approval. Contractor's coverage will be primary in the event of loss and state the deductible or retention level. Contractor shall provide a current Certificate of Insurance and renewal upon expiration of any of the required coverages. Contractor shall immediately notify the City of any change in insurance coverages.

Additional Insured - the City must be listed as an Additional Insured by endorsement for any General Liability policy on a primary and non-contributory basis. Such coverage will specifically include products and completed operations coverage.

Description of Operations shall state: "Project Name: The City of Albany, its officers, employees and agents are additional insureds with respect to Contractor's activities to be performed under this Contract. Coverage shall be primary and non-contributory with any other insurance and self-insurance, (include the number). This form is subject to policy terms, conditions and exclusions." A copy of the endorsement shall be attached to the Certificate of Liability Insurance. Contractor shall provide complete copies of insurance policies if requested by the City.

Certificate holder shall be listed as: City of Albany, P.O. Box 490, Albany, OR 97321. Certificates of Insurance may be emailed to City of Albany, Finance Dept., Diane Murzynski, at insurance@cityofalbany.net.

Signature Block:

Applicant's Acceptance:



Date:

1/16/23

Company Name:

Creating Housing Coalition



Request for Applications (RFA): Community Development Block Grant Activities

Applications Due by 5:00 p.m. Thursday, January 19, 2023

333 Broadalbin Street SW, Albany, Oregon 97321-0144 | BUILDING 541-917-7553 | PLANNING 541-917-7550

Exhibit G: RELIGIOUS/FAITH-BASED ORGANIZATION CERTIFICATION

If the agency is or represents that it is, or may be deemed to be, a religious or denominational institution or organization or an organization operated for religious purposes. The agency agrees that, in connection with such community development activities and operational costs:

1. It will not discriminate against any persons seeking CDBG-funded services and/or related services on the basis of religion or religious belief; and
2. It will not use CDBG funds to support any inherently religious activities, such as worship, religious instruction, or proselytization.

The agency/subrecipient is NOT a religious organization.

Signature

1/16/23

Date

Carol Davies, Vice President

Printed Name and Title

Creating Housing Coalition

Agency Name

The agency/subrecipient IS a religious or faith-based organization and agree to follow terms above.

Signature

Date

Printed Name and Title

Agency Name

CAROL DAVIES
224 Sherman St NE
Albany, OR 97321
802-461-5554

EXECUTIVE SUMMARY

Multi-faceted experience with executive management of organizations; particular strengths include:

- Developing and implementing innovative programs and products and services.
- Working with constituent groups including boards, committees, volunteers, and external audiences.
- Building and retaining exceptional staff and creating warm and supportive work environments.
- Overseeing and coordinating all aspects of budgeting and financial management.
- Leading organizations through periods of substantial growth and transition.

PROFESSIONAL EXPERIENCE

2021-Present

Community Outreach Assistance Team (COAT)
Executive Director

- Initiated a street outreach program to address lack of coordinated effort to assist unhoused and housing-unstable individuals
- Collaborated with multiple agencies to secure a facility, acquire funding, obtain staffing, and establish protocols
- Established a network of volunteers from multiple agencies
- Oversees ongoing training for staff and volunteers
- Researches grant opportunities and write proposals for charitable foundations and other organizations
- Develops and manages funding plans and budgets
- Purchases all supplies and oversee inventory

2002-Present**Kingdom Iron Works, LLC****Owner**

- Performs all office functions for steel fabrication business including payroll, billing, accounts payable, reconciling accounts, generating financial statements and forecasts.
- Provides excellent customer service
- Manages and maintains website
- Generates shipping documentation

Education**Lyndon State College, Lyndon, VT**

B.S. Degree in Human Services, 2014

Bridgewater State College, Bridgewater, MA

B.A. Studies in Art and Business Management, 1983-1990

Workshops and Seminars for the following: Harm Reduction, Trauma Informed Care, De-Escalation, Narcan Administration, Racial Equity, Funding Non-Profits, Building a Trauma-Informed Community, Mental Health First Aid, Trans 101 – LGBTQ+: Topics for New Learners

CREATING HOUSING COALITION BOARD MEMBERS

Stacey Bartholomew, President, Program Development Chair

Carol Davies, Vice President, Outreach Chair

Carmen Moody, Treasurer

Laura Kadelbach, Secretary

Gary Goby, Construction Chair

Danielle Hutchinson, Grant Writer

Larry Eby

Tessa Green

Bill Root

Hawkeye Hawken

Rob Dibble

Al Shattuck

STAFF CONFIDENTIALITY AND NON-DISCRIMINATION AGREEMENT

_____ I acknowledge that I am responsible for maintaining the confidentiality of information relating to guests, volunteers, or staff members. I will not share any personal or identifying information of anyone I interact with on shift unless related to an immediate health or safety concern.

_____ I will not engage in discrimination or harassment in any programs, activities or employment based on race, color, sex, sexual preference, gender or gender identity, marital or parental status, religion, national origin, age, mental or physical disability, economic status, or veteran status. I will treat all individuals I encounter with dignity, respect, empathy, and compassion.

_____ I have reviewed the Safety Plan and Accident Reporting protocol.

Signed _____

Printed Name _____



Helping People. Changing Lives.

Jan 18, 2023

TO: City of Albany CDBG Grant

FROM: Melissa Egan, MPA, MS
Housing Services Coordinator

RE: Letter of Support for Community Outreach Assistance Team (C.O.A.T.)

I am writing to encourage the City to fund the Community Outreach Assistance Team (C.O.A.T.). I coordinate the Point In Time Count for Linn, Benton, and Lincoln counties. I am intimately aware of the positive impact Carol Davies has on our community. Her leadership, ability to engage volunteers, and passion for outreach are absolutely worth your support.

Community Services Consortium is the Community Action Agency for Linn, Benton and Lincoln counties. CSC helped launch this new outreach team beginning late fall 2021 to help people live through the winter unsheltered, and provide a volunteer team for the January 2022 PIT Count . C.O.A.T. focuses on the City of Albany and collaborates with organizations in that service area. CSC funded supplies, and Carol of C.O.A.T. assumed the leadership role: organizing trainings, scouting locations, purchasing supplies, and coordinating volunteers and agency staff to ensure maximum geographic coverage with limited resources. Carol is a natural collaborator, and created partners in the effort including C.H.A.N.C.E., Albany Helping Hands, SSVF, Family Assistance Resource Center, SORT in Corvallis, over 20 Linn County residents who volunteer their time.

I would be happy to answer any questions or provide more specific examples of why C.O.A.T. deserves your attention and support. We cannot end homelessness without street outreach – every community would be lucky to have a leader like Carol Davies.



Request for Applications (RFA): Community Development Block Grant Activities

Applications Due by 5:00 p.m. Thursday, January 19, 2023 (PST)

333 Broadalbin Street SW, PO Box 490, Albany, Oregon 97321-0144 | Planning 541-917-7550

EXHIBIT A: APPLICATION

5.1 Applicant Information

Applicant (organization name): Corvallis Neighborhood Housing Services, Inc. dba DevNW

Contact Person: Liza Newcomb Email: liza.newcomb@devnw.org

Mailing Address: PO Box 790 Corvallis, OR 97339

Phone #: 541-752-7220 Agency website: www.devnw.org

UEI #: RWNUFDJVCWR3 EIN: 93-1057296

Organization Mission Statement:

DevNW's mission is to create thriving, inclusive and healthy communities through affordable housing, financial/economic opportunity, small business development and policy change.

5.2 Proposal Summary

Activity/Program Name: Albany Home Repair Program

Activity Location: Albany, Oregon

Proposal Summary: *Provide a summary of the proposed activity and anticipated outcomes.*

DevNW proposes to provide deferred payment, no-interest loans for owner occupied home repair to qualified low- and moderate-income homeowners in the City of Albany. Home repairs address health, accessibility, and safety needs, which provide a better living environment for the residents, maintain the value of the home, improve the neighborhood, and, for the elderly, allow them to age in place.

ACTIVITY BUDGET FOR WHICH CDBG FUNDS ARE BEING REQUESTED:

CDBG Funding Request	\$	125,000
Leveraged Funds/Resources	\$	0
Total Activity Budget	\$	125,000



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5.3 CDBG Application Narrative

Provide the information requested below **in a separate document** making sure the narrative corresponds to the numbers provided so the required information can be easily found to ensure a complete application. If the question does not apply to the proposed project write N/A.

Activity Description

1. Explain which priorities in Albany's 2023-2027 Consolidated Plan will be addressed by the activity.
2. Describe the community need that will be addressed by the proposed activity.
3. Explain how the activity is an effective strategy to address the identified gap in needs. Provide statistics or evidence to document the activity need.
4. Please specify which CDBG National Objective(s) will be satisfied by the proposed activity.
5. Explain how the project will promote inclusiveness and diversity. Include your agency's nondiscrimination policy for employees and clients as an attachment.
6. For faith-based organizations, explain how your agency will ensure CDBG funded activities are separate from explicitly religious activities such as worship, study of religious text, or evangelizing.

Benefit to low-income Albany residents

7. Who and how many will benefit from activity (estimate # of people, describe clients)?
8. Of these, how many are estimated to be extremely low-income (earning <30% of area median)? Is there any special emphasis on serving extremely low-income residents?

Scope of Work

9. Provide a **DRAFT SCOPE OF WORK** that outlines details about the proposed activity including all actions that will be taken to address the identified need and achieve anticipated performance measures and outcomes, and general accomplishments you intend to achieve with this activity.

Project Feasibility – Readiness to proceed

10. Please describe your readiness to proceed, whether land use or other issues are resolved and whether your organization has the administrative capacity to complete the proposed project. Describe the current organizational capacity to complete and manage the activity within the program year.
11. Please complete the schedule that follows or provide one that is applicable to the activity/project that outlines when major activities will be executed and when the project will be completed.

Organizational Capacity and Activity Sustainability

12. Describe experience and success conducting similar projects, use of federal or CDBG funds.
13. If any issues were raised during a federal program monitoring evaluation, please explain the findings and how issues were resolved.
14. Explain agency experience managing construction projects subject to Davis-Bacon and/or BOLI wage requirements and/or soliciting bids for construction projects.
15. Identify any other agencies or partners for this activity/project and define the roles and responsibilities of these partners.
16. Please explain how the agency embraces and demonstrates diversity within the organization.
17. If not fully funded, will the agency be able to pursue the activity/service (possibly at a reduced scale)?

Financial

18. Why are CDBG funds the best fit/source? Are there other sources of funding for this activity?



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5.4 Proposed Activity Budget

Provide the activity budget describing total cost, cost per task, existing (secured) project funds and unfunded costs. (DO NOT PROVIDE THE FULL AGENCY BUDGET HERE JUST THE ACTIVITY BUDGET.) Identify any and all source(s) of funding. This would include other Federal and State grants and loans, monetary donations, in-kind contributions, volunteer labor, donation of materials and supplies, etc. **Use the template provided below or your own as long as the same information is provided.**

Activity/Project Budget Summary (See 24 CFR 570 Subpart J)			
Estimated Total Cost of Activity:	\$125,000		
CDBG Funding Requested for Activity:	\$125,000		
Total Number of People/Households Served:	6 individuals / 3 households		
Total Cost per Person/Household:	\$15,000 per person / \$22,500-30,000 per household		
Total CDBG Cost per Person/Unit	\$15,000 per person / \$22,500-30,000 per household		
Describe Source of Other Funds:	Amount	Amount Secured	Amount Tentative
Federal:			
State:			
Local:			
Donations/Private:			
Grants:			
Loans:			
Activity Budget Detail (Non-Development Activities)			
Specific Cost Item/Description	CDBG Amount Requested	Other Funds Amount	Total Amount CDBG + Other Sources
	\$	\$	\$
Total	\$	\$	\$



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5.5 Staff Experience and Qualifications

Identify the names of staff or contractors participating in the proposed program or activity, their role, experience they have in this role, their title, and the expected FTE on the project. **Include in an attachment resumes for key personnel anticipated to work on the proposed program, project, or activity.** Please make sure to identify the person responsible for collecting program performance data and preparing the quarterly reports for the City.

Employee	Experience and Qualifications
Name: Emily Reiman Title: CEO FTE on This Project: .02 FTE Resume provided as attachment.	Emily has more than a decade of experience in affordable housing and economic development, with even longer experience in nonprofit management and organizational development. Before becoming CEO of DevNW, Emily served as Executive Director of NEDCO for five years, and before that she managed NEDCO's homeownership and asset building programs. Emily has successfully managed many federal funding sources and housing development projects using federal, state, and local funding sources. She provides high-level oversight of and strategic direction for DevNW's real estate development pipeline, housing rehab programs, and rental housing portfolio, and she works closely with our finance department to ensure compliance with all federal funding requirements.
Name: Rebecka Weinstein Title: Community Director, Linn and Benton Counties FTE on This Project: .02 FTE Resume provided as attachment.	With more than twenty years of experience in community building and engagement, Rebecka has been a critical team member in DevNW's comprehensive community development work since 2010, providing leadership to DevNW's Thriving Communities Department and the Linn Benton Health Equity Alliance.
Name: Liza Newcomb Title: Home Repair Manager FTE on This Project: .1 FTE Resume provided as attachment.	Liza Newcomb has a Master of Science in Community and Regional Planning; 9 years of planning experience; 10 years of construction supervision experience; completion of Home Inspection Training Course; training by NeighborWorks®; successfully completed CDBG requirements and activities for City of Sweet Home in 2016, City of Lebanon in 2017, and the city of Harrisburg in 2019. Liza currently administers CDBG grants for the City of Albany, the City of Sweet Home, and the City of Lebanon. *Liza will be responsible for collecting program performance data and preparing the quarterly reports for the City.



Request for Applications (RFA): Community Development Block Grant Activities

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<p>Name: Kym O'Hare</p> <p>Title: Homeownership Lending Manager</p> <p>FTE on This Project: .2 FTE</p> <p>Resume provided as attachment.</p>	<p>Kym O'Hare has worked in the mortgage originator industry for over 29 years and is licensed as a Safe Act certified Mortgage Originator; has completed extensive training by NeighborWorks America; is certified in Full Cycle Lending, and as a HUD Pre and Post purchase Housing Counselor, including foreclosure mitigation.</p>
<p>Name: Russell La Rosa Snyder</p> <p>Title: Home Repair Coordinator</p> <p>FTE on This Project: .2 FTE</p> <p>Resume provided as attachment.</p>	<p>After earning a Bachelor of Arts in Sociology and Ethnic studies, Russell worked as an AmeriCorps for Habitat for Humanity in their home repair program, performing extensive renovations on homes from roof to foundation work. He has continued his education and ability to reach the community by taking Spanish classes, completing a home inspection course, and becoming a lead-safe certified renovator. Russell helps guide homeowners through the process of finding a contractor and getting the necessary repairs done on their home.</p>
<p>Name: Gabby Bautista</p> <p>Title: Home Repair/Rehab Project Support Specialist</p> <p>FTE on This Project: .2 FTE</p>	<p>Gabby Bautista has been at DevNW since January 2020 as Program Support Specialist, primarily in education support. In November 2021 her full-time role shifted to the Home Repair team, as this project area's support specialist. Gabby also provides bilingual and bicultural support.</p>

5.3 CDBG Application Narrative

Activity Description

1. Explain which priorities in Albany's 2023-2027 Consolidated Plan will be addressed by the activity.

DevNW's Albany Home Repair Program addresses the following priorities in Albany's 2023-2027 Consolidated Plan:

PRIORITY 1: Support affordable housing in Albany.

Home repair can be a difficult financial burden for homeowners with low and/or fixed incomes. The recent rapid rise of inflation and pandemic-related economic challenges have greatly exacerbated the financial burden. The DevNW Home Repair Program assists households who otherwise would not be eligible for a home equity loan due to income and/or credit worthiness. This helps to maintain affordable, stable housing for families with low incomes.

PRIORITY 5: Strengthen and revitalize low- and moderate-income neighborhoods.

Home repairs address health, accessibility, and safety needs, which provide a better living environment for the residents, maintain the value of the home, improve the neighborhood, and, for the elderly, allow them to age in place.

2. Describe the community need that will be addressed by the proposed activity.

This program is a much needed service for low- to moderate-income homeowners in Albany. Oregon has one of the least affordable housing markets in the country. In the City of Albany, 27% of owner-occupied households are housing cost-burdened, meaning they contribute more than 30% of their income to housing. High inflation rates – projected to continue – make it difficult for cost-burdened households to finance home repairs, as they have less disposable income to utilize. The pandemic has only heightened these challenges contributing to unemployment, decreased income, and financial insecurity. Lower household incomes can make it difficult for homeowners to make necessary repairs to their homes, ultimately leading to deteriorating quality, lower home values, and increased health and safety concerns.

3. Explain how the activity is an effective strategy to address the identified gap in needs. Provide statistics or evidence to document the activity need.

When household budgets are strained, families will put off home rehabilitation in order to pay for other essentials. Because families in the service area already face economic issues, we can expect that they will continue to delay home repairs in order to provide food, transportation, and other essentials for themselves and their families. DevNW's home repair program helps homeowners and their families stay in housing that is made safer and healthier. The home value is maintained and sometimes improved as deferred maintenance is performed.

The percent of people living at or below the poverty line in Linn County is higher than that of the state overall. As of 2019, 16.1% of Linn County residents live at or below the poverty line compared to 14.9% in the state of Oregon. These numbers do not reflect the more recent economic recession and lost employment as a result of Covid-19. The American Community Survey reports that 19.6% of Linn County residents qualified for SNAP benefits in 2021; a significant increase from the 14.4% reported prior to Covid-19. SNAP benefit data shows that one in five Linn County residents receive nutritional assistance benefits, indicating a high need in the county for food relief and support.

DevNW's Home Repair Program provides loans for necessary home repairs to homeowners with low- to moderate-incomes in Albany; allowing them to protect their greatest asset, remain safely in their home, and age in place. With 14 clients currently on our Albany home repair waitlist – some of whom have completed the Preliminary Assessment – we know this program is addressing a need in the community. DevNW works to make funds more accessible to everyone, especially people who have been historically excluded from transformative financial tools. We believe that homeownership is the single best way for families with low or moderate incomes to build generational wealth, and access to funds and financial services to both build and maintain assets is critical to the wellbeing and vitality of individuals, families, and our whole community.

4. Please specify which CDBG National Objective(s) will be satisfied by the proposed activity.

One of the three CDBG National Objectives is "Activities Benefitting Low/Moderate Income Persons." DevNW's Home Repair Program benefits low- and moderate-income persons, using HUD income guidelines (2022 income guidelines shown in chart below). During DevNW's rigorous loan application process (see 9.2 below), applications are screened to verify that each household is below 80% AMI.

Albany, OR MSA: 2022	Persons in Household							
HUD Income Limits	1	2	3	4	5	6	7	8
30% of median income	\$15,800	\$18,310	\$23,030	\$27,750	\$32,470	\$37,190	\$41,910	\$46,630
50% of median income	\$26,300	\$30,050	\$33,800	\$37,550	\$40,600	\$43,600	\$46,600	\$49,600
80% of median income	\$42,100	\$48,100	\$54,100	\$60,100	\$64,950	\$69,750	\$74,550	\$79,350

5. Explain how the project will promote inclusiveness and diversity. Include your agency's nondiscrimination policy for employees and clients as an attachment.

DevNW believes that everyone should have the opportunity to be healthy, regardless of income, race, education, or where they live. Our Home Repair Program directly impacts low-income households who otherwise would not be able to afford the cost of home repair on their own. Through dedicated lending, we help households that are currently excluded from receiving traditional loans due to poor

credit history or limited income, to access funds and make repairs that allow them to stay safely in their homes. In this way, we are ensuring that underserved low-income populations are included in our programs.

In addition to serving low-income households, DevNW's commitment to inclusion and diversity is demonstrated by the organization's current work toward Diversity, Equity, Inclusion and Justice (described in #16 below). We currently have 23 bilingual staff, 19 of whom deliver services to Spanish-speaking clients, including bilingual assistance for the home repair loan application process. We take great care to ensure our organizational and marketing materials are accessible, friendly, and appealing to clients across cultural backgrounds. In 2021, our Home Repair Program marketing materials were translated to Spanish and made available online. We also work with translation and American Sign Language services for clients with language needs beyond English and Spanish.

6. For faith-based organizations, explain how your agency will ensure CDBG funded activities are separate from explicitly religious activities such as worship, study of religious text, or evangelizing.

N/A

Benefit to low-income Albany residents

7. Who and how many will benefit from activity (estimate # of people, describe clients)?

If awarded, this project will potentially serve 3-24 LMI Albany residents directly, and the surrounding neighborhood and city with healthier, more valuable homes.

8. Of these, how many are estimated to be extremely low-income (earning <30% of area median)? Is there any special emphasis on serving extremely low-income residents?

An estimate of only 2% of our clients would qualify as extremely low income, earning <30% of area median. Most people in that income bracket are, unfortunately, not home owners. For this reason, this specific DevNW program area does not emphasize serving extremely low-income residents.

Scope of Work

9. Provide a DRAFT SCOPE OF WORK that outlines details about the proposed activity including all actions that will be taken to address the identified need and achieve anticipated performance measures and outcomes, and general accomplishments you intend to achieve with this activity.

Below is an outline that describes the steps borrowers go through in DevNW's Home Repair program.

Step #. Activity		Process
#1. Pre-Screening & Intake		
	Preliminary assessment	Over the phone or online questionnaire to determine if homeowners meet basic requirements to apply to the program. If they meet all of the requirements, DevNW staff then place them on a waiting list, and send out a DevNW intake package.
	Intake application	Staff reviews the intake application; homeowners are notified whether or not they meet the minimum requirements to apply for a loan.
#2. Loan Application		
	Applicant's name comes to top of waiting list	As applicants reach the top of the waiting list, the lending coordinator arranges a time to begin a loan application.
	Income and asset verification	The DevNW lending coordinator performs an analysis of the household's income, assets, and credit, to verify the household is below 80% AMI, and meets all other underwriting requirements. Formal certification, however, may not occur until all information is verified and an initial site visit has taken place.
	Project qualification	DevNW staff reviews the status of property's ownership, taxes, insurance, title report, etc. to determine that these are in compliance with program policies.
#3. Inspections		
	Initial site visit	Typically, within two to three weeks after the loan application, the DevNW Home Repair Manager schedules a visit to the home for the purpose of conducting a Health and Safety inspection of the home.
	Project Feasibility Analysis	Loans do not exceed \$35,000. Essential health and safety repairs must feasibly be completed within this maximum amount or within a lesser amount that the applicant has qualified for. The home must also pass a number of reviews, including; historical significance reviewed by the State Historic Preservation Office (SHPO), environmental impact review, and flood zoning.

	Follow-up Visits	Depending on the complexity of the project, additional site visits may be necessary to completely determine the full scope and details of the project.
	Lead Hazard Risk Assessment	If the home was constructed prior to 1978, lead paint testing will be performed and a Lead Hazard Risk Assessment may be performed. The cost of this Assessment is rolled into the loan.
	Scope of Work	DevNW staff develops a written Scope of Work (SOW) for the project. Homeowners have the opportunity to review and edit this document prior to sending it out to construction contractors.
#4. Contractor Selection		
	Preliminary Contractor Search	DevNW does not provide homeowners with a contractor. DevNW maintains and provides a list of contractors who have the necessary lead safety training, are licensed by the Oregon Contractor Board and who have worked with the program in the past. DevNW provides homeowners with this list at their request.
	Homeowner should not sign anything or buy anything	Since the loan is not yet approved, DevNW reminds homeowners <u>not to</u> sign any contracts and not to purchase any items or materials for project.
	Requests for Proposals (RFP)	Once the SOW is complete, homeowner is provided with a Request For Proposal (RFP) packet. The homeowner will need to distribute the packets to qualified contractors. Typically, contractors need three weeks to a month to put together a proposal (bid). DevNW requires homeowners to get at least three proposals for each major aspect of the project.
	Proposal Analysis	DevNW staff assists homeowner with analyzing the proposals/bids that they receive from contractors, but the homeowner is responsible for the selection of a contractor.
	Final Budget and Loan Amount	DevNW staff assists homeowner with putting together a final budget, scope of work, and loan amount for the project.
#5. Loan Closing		
	Request for Approval	After all the above has been completed, loan requests are submitted to DevNW Chief Executive Officer for approval.
	Loan Closing	If the loan is approved, DevNW staff will put together the loan documents (Promissory Note, Deed of Trust, etc.) and schedule a loan closing. DevNW staff ensures that homeowners understand the terms of the loans, and are available to meet with a housing counselor to review the loan.

	Closing Costs	Although DevNW does NOT charge any fees or interest to the homeowner for closing a housing rehabilitation loan , there are other fees that apply. The closing costs (which include fees for title insurance and recording) will be rolled into the loan.
	Notice to Proceed	After a 3-day recession period (during which the homeowner can back out of the loan) the homeowner will be issued a Notice of Award letter, confirming that the loan has been closed and that the homeowner is free to sign contracts with contractors.
#6. Construction		
	Construction Contract Signing	Although homeowners are now permitted to sign construction contracts for their project, DevNW recommends that they consult with the DevNW Home Repair Manager first. Contractor selection must be approved by DevNW staff before contract signing in order to ensure that the contractor has all proper licensing. DevNW staff provides sample contracts for use with the contractor. It is the homeowner's responsibility to schedule and coordinate the project with the contractor. Homeowners have a maximum of 90 days from the date construction contracts are signed to complete all phases of the project.
	Construction Work	Repairing a house can be stressful, but it can also be exciting and satisfying. The homeowner has various responsibilities that include: making the house, water, and electricity available to contractors; communicating with the contractor and making timely decisions with regard to materials, fixtures, colors, etc. and inspecting the quality of work on a daily basis. DevNW does not guarantee the work of any contractor, and DevNW is not responsible for the work or actions of the contractor.
	Progress Payments and Inspections	DevNW disperses loan funds directly to the contractor. Before payment is released, DevNW staff inspects the work to confirm that value is present. Work requiring permits must pass inspection by a Building Inspector. All payments require written authorization by both the owner and a DevNW staff member.
	Change Orders	Homeowners are advised not to sign any change orders without first obtaining approval from DevNW staff. Homeowners are responsible for work and materials not authorized by DevNW staff and for construction costs that exceed the amount of the loan.

#7. Project Close-Out		
	Lead Hazard Clearance	Work involving lead paint hazards are subject to a clearance examination by a DevNW-approved Risk Assessor.
	Project Closeout	Homeowners are to ensure that the contractor has provided them with a Homeowner's Manual that contains a list of subcontractors, warranties, manufacturing instructions, paint specification, etc. All unused loan funds are returned to the lender and, if money is returned, the lien is reduced accordingly. DevNW then meets with homeowners to sign final close-out documents.

Once all the steps are accomplished from the above description the homeowner will be living in a healthy home that benefits the surrounding neighborhood and community at large.

Project Feasibility – Readiness to proceed

10. Please describe your readiness to proceed, whether land use or other issues are resolved and whether your organization has the administrative capacity to complete the proposed project. Describe the current organizational capacity to complete and manage the activity within the program year.

DevNW brings over 30 years of service and strong community relationships to our efforts to create healthy and thriving communities; and has fourteen years of experience operating a home repair program benefiting low-income homeowners. We have both an experienced Loan Manager and Home Repair Manager on staff, and the technical, financial and administrative capacity to perform the proposed three home repair loans within the timeframe. No land use issues are expected. We have been very successful at operating the Linn County Housing Rehabilitation Program and all program audits have had no findings or concerns on any of the Community Development Block Grants (CDBG). As of 12/31/2021, DevNW's Rehab Program had completed 463 loans. In 2022 our loan activity totaled 26 loans, including new loan activity that is in progress. We have processed a running total of \$9,037,750 in loans prior to 2022. Our added activity in 2022 included \$453,788.67 in total award receipts from active grants, showing a sum of \$9,491,538.67 in total loans processed.

11. Please complete the schedule that follows or provide one that is applicable to the activity/project that outlines when major activities will be executed and when the project will be completed.

N/A; The schedule for each home rehabilitation project depends on clients, contractors, and material supplies. Therefore, it is not possible to predict when projects will be started or completed.

Organizational Capacity and Activity Sustainability

12. Describe experience and success conducting similar projects, use of federal or CDBG funds.

Since 2007, DevNW has been the sub-grantee for seven Housing Rehabilitation grants. Several of the grants were transferred from Linn County Affordable Housing in early 2007 when DevNW took over the program. The grants included HR 405 – Harrisburg, HR 507 – Sweet Home, and HR 605 – Lebanon. The HR 605 – Lebanon grant was the first grant that DevNW managed from start to finish. The grant had no findings when it was monitored in late 2008, and it was completed within the required timeframe. In 2010, DevNW was the sub-grantee for the HR 105 grant through Linn County and there were no findings or concerns during the monitoring in November 2012. In 2013, DevNW was the sub-grantee for H13012 through the City of Sweet Home, and no findings or concerns were reported during the monitoring in March 2016. In 2017, DevNW was the sub-grantee for H16014 for the City of Lebanon and successfully closed that grant out in October of 2018, again with no findings or concerns during the monitoring. In 2018, DevNW was the sub-grantee for H17009 for the City of Harrisburg and successfully closed that grant out in February of 2020, again with no findings or concerns during the monitoring. In 2022, DevNW completed its work as the sub-grantee for Sweet Home's 2019 grant, H19012. Currently, DevNW is implementing the City of Lebanon's \$400,000 grant award for Home Repair from Business Oregon 2020 CDBG.

As mentioned above, DevNW took over operation of the Linn County Home Repair Program (LCHRP) from a failing community development corporation. We have been operating the home repair program in collaboration with LCHRP ever since. This partnership includes ten municipalities in Linn County. The housing goals of the home repair program, are to: 1) Alleviate health and safety problems and correct structural deficiencies in target area homes; 2) Conserve and improve existing low income housing stock; and 3) Enable low income homeowners to remain in their homes. DevNW is responsible for the daily operations of this program and all capital is on DevNW's balance sheet. In addition, DevNW was awarded Community Housing Services' Housing Rehabilitation portfolio (operated by Community Services Consortium) and now serves a three county area: Linn, Benton and Lincoln. If awarded, the Albany CDBG grant funds will remain in Albany in a separate revolving loan fund.

13. If any issues were raised during a federal program monitoring evaluation, please explain the findings and how issues were resolved.

There was a minor finding during the 2019 Sweet Home grant monitoring evaluation: the Fair Housing Resolution publication was not done in a timely manner. The issue was acknowledged and resolved by a letter to Business Oregon and no further action is needed.

14. Explain agency experience managing construction projects subject to Davis-Bacon and/or BOLI wage requirements and/or soliciting bids for construction projects.

N/A

15. Identify any other agencies or partners for this activity/project and define the roles and responsibilities of these partners.

DevNW Home Repair staff are currently working with City of Albany, City of Sweet Home and City of Lebanon staff on current CDBG loans and collaborating closely with Community Services Consortium (CSC) by recommending clients apply for weatherization services. This allows the client to leverage available resources for the repair of their home. For example, when our Home Repair Manager is on site and identifies the need for updated windows, weather stripping around doors, added insulation or other items which would increase the home's energy efficiency, she gives the client information and contacts for CSC and strongly encourages them to apply for the weatherization services.

16. Please explain how the agency embraces and demonstrates diversity within the organization.

DevNW strives to provide services and programming that are relevant and responsive across a range of social identities, and particularly to identity groups that are experiencing or have experienced discrimination or marginalization in housing, homeownership, lending, and business development. We believe in advancing neighborhood development where physical, social, informational, and psychological access are barrier free AND opportunity for a range of community services exists REGARDLESS of an individual or family's identity boxes BECAUSE a neighborhood is a place for belonging. We work together- with our staff, clients, board of directors, residents, partners, funders, policymakers, and supporters- towards a commitment for shared culture to:

- Confront historical roots of disparities
- Prioritize racial equity
- Promote economic justice
- Develop communal spaces free from exclusionary attitudes, practices, policies, and experiences

For example, we intentionally recruit and hire staff that reflect identity groups within our participants. Today, 82% of our asset building staff are bilingual and bicultural, and deliver services to Spanish-speaking clients. We also work with translation and American Sign Language services for clients with language needs beyond English and Spanish. Additionally, many of our programs have been developed in collaboration with community partners and clients to ensure programs can effectively meet the needs of vulnerable populations.

We know that COVID-19 disproportionately impacted our low-income and Black, Indigenous, and People of Color (BIPOC) community members. Low-income and BIPOC workers were more likely to be laid off and/or exposed to COVID, and less likely to access emergency assistance. Our programs and services are designed to offer multi-layered solutions to address exclusionary barriers. One of our foci is to close the racial gap in homeownership. We recognize that a single resource in most circumstances is ineffective. We identify and use multiple resources through programming and services to respond to each barrier. For example, we recognize that the history of housing in the USA is a story of exploitive, racist, exclusionary and disinvestment policies and practices, which led to systemic marginalization and segregation for non-white bodies. This is why we prioritize building wealth and increasing

homeownership for folks who are/have been systemically marginalized by investing in affordable housing, providing down payment assistance, administering matched savings program, and offering credit builder loans. In 2021, we graduated 120 IDA savers, matching nearly half a million dollars towards their goals. Furthermore, we have become a statewide leader and developer in the Community Land Trust model for homeownership. We have built 18 CLT homes and are developing an additional 85 over the next two years in communities throughout Oregon. This model has been shown to keep housing affordable for the long-term and to disrupt real estate speculation. We hope to continue building additional layers on this approach, including the addition of an affordable ITIN mortgage product in the next five years.

17. If not fully funded, will the agency be able to pursue the activity/service (possibly at a reduced scale)?

The DevNW Home Repair program requires a minimum of \$22,500-30,000 per household in order for loans to be processed and repair projects to be completed. Therefore, a smaller amount of funding would reduce the number of families we could assist.

Financial

18. Why are CDBG funds the best fit/source? Are there other sources of funding for this activity?

There are no other sources of funding for this activity in the City of Albany.

EMILY REIMAN

1160 Maple Drive
Eugene, OR 97404
541-968-9804

PROFESSIONAL EXPERIENCE

NEDCO (Neighborhood Economic Development Corporation)
Executive Director, NEDCO and CLW

Springfield, OR
December, 2014 – present

- Provide organizational leadership, strategic direction, and budget oversight for two nonprofit organizations: a Community Development Corporation (NEDCO) and its affiliate Community Development Financial Institution (Community LendingWorks, CLW).
- Cultivate partnerships, projects, and funding opportunities across a broad spectrum of economic development and asset building fields, including affordable housing development, neighborhood revitalization, microenterprise development, social entrepreneurship, financial literacy, first time homeownership, and foreclosure prevention.
- Support the expansion of CLW, including recruiting investments, building internal capacity, and developing plans for deployment of consumer and small business loan funds.
- Collaborate with both boards of directors to ensure active organizational oversight, strategic planning, and leadership that reflects the diversity of the communities we serve.
- Facilitate annual planning process to develop work plans and organizational budgets.
- Utilize NEDCO's expertise and direct experience with low income individuals and families to inform our participation in local and statewide advocacy efforts for funding and policies that improve economic opportunities for low income communities.

Manager, OpportunityWorks Department

July, 2010 – December, 2014

- Led a three-county department that included all asset building, financial literacy, pre-purchase homeownership and foreclosure prevention education and counseling services.
- Managed \$1.4 million annual operating budget for the department, including state and federal contracts management.
- Collaborated with the Executive Director to set department priorities and objectives; participated on Management Team to assist with agency-wide strategic planning and coordination.
- Developed programs and class curriculum to address new or changing community needs, including new foreclosure prevention and basic financial literacy programs.
- Expanded the department from five staff in two locations to 21 staff across three locations.
- Built statewide collaboration of housing counseling agencies to advocate at the state and federal level for policies and funding for asset building and foreclosure prevention.

Looking Glass Youth and Family Services
Supervisor, Independent Living Program (ILP)

Eugene, OR
June, 2008 – July, 2010

- Supervised ILP staff and interns, including annual reviews; facilitated staff meetings and trainings.
- Provided ongoing program management of ILP including strategic planning, fulfillment of contract obligations, budget tracking, annual reports, etc.
- Collaborated with community partners to develop a new wrap-around program for young women aging out of foster care.
- Conducted trainings and presentations for case workers, foster parents and community partners.
- Planned major events such as statewide ILP Provider Retreats and Youth Spring Break Camp.

Facilitator, Independent Living Program

July, 2007 – June, 2008

- Provided client-centered case management services for 20-25 youth transitioning out of foster care.
- Prepared and presented group curriculum for weekly skill-building groups.
- Facilitated team meetings and coordinated transition plans with youth, caseworkers and foster parents.

Oregon Judicial Department

Salem, OR

Coordinator, Citizen Review Board (CRB) Program

August, 2005 – July, 2007

- Coordinated the Foster Care Citizen Review Board Program in Douglas, Coos and Curry Counties.
- Facilitated review hearings that included caseworkers, attorneys, biological and foster parents, etc.
- Recruited, trained and supervised 10-15 volunteer Board Members in each county.
- Represented CRB on local Juvenile Court Improvement Committees

AmeriCorps VISTA

Roseburg, OR

VISTA Team Leader, Umpqua Community Action Network

2004 – 2005

School-to-Work Coordinator, Phoenix School of Roseburg

2003 – 2004

BOARD AND COMMITTEE MEMBERSHIPS

Governor's Foster Care Advisory Commission

2016 – present

Vice-Chair

City of Eugene / Lane County Housing Policy Board

2016 – present

Member

Oregon Consumer Justice Board of Directors

2016 – present

Member

Oregon Opportunity Network Board of Directors

2015 – 2017

Member

United Way of Lane County Financial Stability Partnership

2014 – 2017

Member, Executive Committee

Oregon Attorney General's Foreclosure Avoidance Advisory Council

2012 – 2015

Member

EDUCATION

Mount Holyoke College, South Hadley, MA

Bachelor of Arts, Comparative Politics

LIZA NEWCOMB, MSCRP

257 SW Madison Avenue
Corvallis, OR 97333
541.752.7220 ext. 2051
Liza.Newcomb@devnw.org

Current Position

Home Repair Manager at DevNW, a non-profit community development corporation.

- Manage daily operations for DevNW's Home Repair Program; conduct/review client interviews for program eligibility; review and approve application packages; perform on-site housing inspections and prepare bid specifications according to Housing Quality Standards; monitor all aspects of project construction for compliance of all federal, state, and local codes and regulations; help secure future program funding from the Community Development Block Grant Program and other sources; and ensure compliance with all federal, state, and local codes, policies, and funding regulations.
- Serve as a Project Manager and/or owner's representative during the rehabilitation or new construction of housing owned or being developed by DevNW.
- Assist other DevNW staff and consultants regarding capital improvements to DevNW properties and during the pre-construction phase of DevNW rehabilitation and/or construction projects.
- Manage the Linn County Home Repair Program in compliance with HUD CDBG regulations in partnership with the Linn County Housing Rehabilitation Partnership.
- Attend ongoing, continuing education through NeighborWorks® Network
- Serve as the project manager and/or owner's representative during the rehabilitation and/or construction phase of DevNW housing projects.
- Monitor project expenditures and progress, and establish mechanisms for assuring that projects are completed on time and within budget.
- Serve as a resource to the DevNW Asset Manager and property managers on long term capital improvement plans, grant compliance, and other matters.
- Review client intake forms and determine general eligibility for Home Repair Program.
- Process, review and approve Home Repair Loan applications for completeness in partnership with DevNW's licensed mortgage broker.
- Conduct Home Repair Loan site visits and project evaluation.
- Prepare bid specifications for construction projects and negotiate contracts.
- Oversee the work of outside contractors/consultants.
- Manage loan and grant portfolio, which includes monitoring grant draw requests, balances, close-out, reporting, and other administrative functions for multiple grants.
- Monitor compliance and ensure implementation of and adherence to federal, state, and local codes, regulation and policies as they pertain to funding/code requirements and internal policies.

Professional Accomplishments

Management, Supervision and Marketing

- Trained personnel on customer service, procedures and computer programs
- Performed financial management and planning
- Maintained inventory levels
- Designed and refined advertising and marketing plans; increased sales by 250% in first 18 months of operations (Alpine Bakery)
- Performed bookkeeping, payroll, accounts payable and receivable, and tax preparation
- Implemented use of computer programs for tracking case files, inventory, and sales
- Held leadership positions in various organizations
- Trained personnel on complex fulfillment and shipping tasks
- Designed and sourced items for client product presentations
- Created in-depth operations manual
- Helped grow small company with 5 full-time positions to 16 full-time positions in under 3 years
- Performed IT functions including technical support, purchasing of hardware and software

Construction and Remodeling

- Solicited bids from contractors and supervised completion of projects
- Checked blueprints for compliance to codes
- Read blueprints during project construction
- Designed and carried out remodel projects, including framing, drywall, electrical, plumbing, painting, and insulation
- Member of a crew of four women that built a house from the foundation to the roof in 3 months
- Volunteered for New Orleans Area Habitat for Humanity, Musician's Village, in February 2007; installed drywall, insulation, siding, roofing and trained other volunteers on construction techniques
- Applied for building, electrical and other construction permits; ensured compliance with regulations and inspections
- Completed home inspection training course
- Managed construction project for small business; including negotiating with contractors, engineers, utility providers and city staff

Regulation Administration

- Prepared application and administered Community Development Block Grant for the City of Albany
 - Revised the City of Albany Development Code
 - Reviewed development applications for compliance with applicable codes
 - Performed field inspections
 - Coordinated reviews with other local jurisdictions and state agencies
 - Prepared reports for development review applications
 - Prepared successful applications for change in use from residential to office use, and historic reviews
 - Prepared successful application for and administered rural water system improvement project
-

REBECKA ANN WEINSTEIGER
rebecka.weinsteiger@gmail.com
Cell: 541-224-4379

RELEVANT WORK EXPERIENCE

Linn Benton Community Director, November 2020 - Present

Dev Northwest, Corvallis, OR

Providing regional leadership for the full breadth of DevNW work, and secondary/interim oversight and supervision of programs that serve the Linn/Benton region in co-leadership with the DevNW executive team.

Community Engagement/Thriving Communities Manager, July 2015 – November 2020

DevNorthwest (Willamette Neighborhood Housing Services), Corvallis, OR

Overseeing the Community Building and Engagement line of business, delivery of resident and community health worker services to our 400+ units of affordable housing in Linn, Benton & Lane Counties, developing and coordinating services that increase access to healthcare and resources, support community development and resident leadership and stabilizing residents through crisis and eviction interventions. Supervising the Linn Benton Health Equity Alliance staff and coordinating Living Southtown (2015-2020), a grassroots community organizing effort to build a healthy, accessible and equitable development plan for South Corvallis.

Corvallis Market Manager, March 2007 - August 2015

Gathering Together Farm, Philomath, OR

Training, managing and scheduling staff for Corvallis markets. Coordinating market supplies and hardware needs for up to 9 weekly markets in 5 different counties. Setting up tents, displays, and marketing materials, managing/breaking down market and financial deposits and record keeping. Side projects included office management support, accounting, graphic design and value-added product development.

Healthy Food Demonstration Coordinator, January 2014-July 2015

South Corvallis Food Bank, Corvallis OR

Building a sustainable food demonstration program that prioritizes fresh produce and other pantry items available at the food bank. Developing recipes and outreach materials. Demonstrating food preparation and distributing samples. Recruiting and training volunteers to sustain the program for years to come.

Survey Leader & Community Organizer, May - September 2013, February- March 2015

Willamette Neighborhood Housing Services

Leading the Community Impact Measurement Survey, including training staff and volunteers, organizing all survey collections, conducting surveys and tracking progress. Assisting in data collection and community perceptions regarding a social enterprise cafe business model. Completing the Living Cities E-course: *The Why and How of Working with Communities through Collective Impact*.

South Corvallis Community Organizer, April 2013-September 2014 (16 month contract)
Healthy Kids Healthy Communities - Creciendo en Salud, Willamette Neighborhood Housing Services - Corvallis, OR

Engaging South Corvallis residents in community initiatives that build community and increase access to healthy eating and active living. Co-organizing a block party picnic with local organizations and businesses to bring free food, drink, and activities to Tunison Park. Co-organizing Corvallis Family Table, a once per month free meal program distributed from the Tunison Community Center. Managing the Leonard St. Community Garden planning and operations, gardener orientations and writing small grants.

Owner/Operator, Weinstein Mustard Co., January 2009 - May 2012

Managing all operations of a home-based hand-crafted artisan mustard business.

Community Food Center Project Coordinator, December 2009-May 2011 (18 month contract)

Corvallis Environmental Center -Corvallis, OR

Conducting a USDA funded needs assessment for a community food center including resident focus groups and organizational stakeholder interviews. Researching and planning for food-related business and entrepreneurship development. Building relationships with South Corvallis Food Bank, their clients, and gleaning groups. Developing and conducting outreach to existing community organizations and to non-traditional groups and engaging them in the planning process. Facilitating the Community Food Center Planning Committee to develop a strategic planning process. Producing the *South Corvallis Community Food Center Report*.

Kitchen & Micro-Enterprise Program Coordinator, February 2010 - February 2011 (12 month contract)

Ecumenical Ministries of Oregon, Interfaith and Food and Farms Partnership - Corvallis, OR

Developing First United Methodist Church Kitchen as a resource to low-income people and microentrepreneurs, assessing the potential for multiple Corvallis faith communities to provide strategic access to commercial kitchens for small-scale economic development. Producing a handbook *Creating Opportunity through Micro-Enterprise: Faith kitchens as micro-business incubators*.

Outreach and Education Coordinator, December 2002 - August 2008

First Alternative Co-op, Corvallis, OR

Recruiting, training, and scheduling up to fifty regular volunteers for various projects. Developing the Co-op Community Kitchen as a multi-use educational and food processing facility. Designing, promoting, teaching and evaluating classes, developing appropriate healthy food curriculum for classroom visits. Maintaining Co-op farm and all seasonal garden tasks. Managing Calzone Booth (farmers' market restaurant) operations for three years, from growing the food in the Co-op farm to buying, ordering, recipe development and maintenance, recruiting and training, staffing, equipment maintenance, permits and licensing. Maintaining involvement with key group organizations to strengthen the local community and its food security efforts.

COMMUNITY & VOLUNTEER INVOLVEMENT

Lincoln Elementary School PTA, Equity Committee (2016-2022)
Leonard Street Low-Income Community Garden, Founder & Lead Volunteer (2010-Present)
Tunison Neighborhood Association, Secretary (2010-Present)
Mesa Familiar Corvallis Family Table, Co-founder and Greeter (2012-2020)
Lincoln Elementary School PTA, Co-Vice President (2018-2019)
The Resiliency Project, Event Volunteer (2017-2019)
Pack 234 Cub Scout Den Leader, Committee Chair (2017-2019)
City of Corvallis, Community Involvement and Diversity Advisory Board, Vice Chair (2016-2018)
South Corvallis Food Bank, Previous Board Member and Demo Volunteer (2012/2013-2015)
OSU Extension Family Food Educator (2009-2013)
Corvallis Albany Farmers Market Board (2009-2012)
Food Biz Boot Camp Organizer (2009-2012)
Ten Rivers Food Web Board (2005-2012)
Sustainability Coalition, Food Promotion Chair (2007-2008)
Corvallis Independent Business Association (2005-2008)

EDUCATION

Oregon State University
Major: Anthropology
GPA: 3.77/4.0

TRAININGS & CERTIFICATIONS

NeighborWorks Training Institute

Kansas City, MO • 5/7/18 - 5/11/18

Popular Education

The Community Capacitation Center (2018)

Professional Certificate in Community Engagement

Neighborworks America (2017)

Trauma Informed Care

Benton County Health Department (2017)

Mental Health First Aid

National Council for Behavioral Health (2017)

Community Health Worker Training

Oregon State University (2015)

Only Neighbors Can Build Neighborhoods

Community Leadership Institute - Columbus, OH • 10/20/16 - 10/23/16

NeighborWorks Training Institute

Detroit, MI • 8/8/16 - 8/12/16

NeighborWorks Training Institute

Atlanta, GA • 2/22/16 - 2/26/16

NeighborWorks Training Institute

Philadelphia, PA • 8/17/15 - 8/21/15

Building Sustainable Communities through Leadership Development

Community Leadership Institute - Sacramento, CA • 10/17/13 - 10/20/13

Kym O'Hare

257 SW Madison Ave
Corvallis, Oregon 97333
(541) 752-7220 ext. 2048
kym.ohare@devnw.org

PROFESSIONAL EXPERIENCE**Homeownership Lending Manager, DevNW
Corvallis, Oregon July 2010-Present**

The Homeownership Lending Manager oversees lending and servicing activities for all counties served by the agency. Duties include:

- Working with the Home Repair Manager and team to administer our Home Repair program to homeowners in Linn, Benton and Lincoln Counties.
- Originating acceptable and well-documented Rehab mortgages and purchase assistance products, and doing so in compliance with all laws and regulations.
- Staying up-to-date on the status of all laws and regulations affecting residential lending and to understand their applicability to DevNW.
- Reviewing and compiling loan documents and completing the loan package and correspondence.
- Maintaining loan data and loan pipeline.
- Servicing a portfolio of various loan types for DevNW including Rehab, DPA and other loan products.
- Managing the sale of certain loans to a secondary market provider if required.
- Developing and maintaining productive working relationships with other real estate industry professionals and financial institutions.
- Marketing program services as needed.
- Preparing monthly and quarterly reports for the agency to our partners including HUD, NeighborWorks America and Oregon Housing Center.
- Assisting with special projects as assigned and other tasks necessary to achieve the overall goals of the Home Ownership Center and DevNW.

**Loan Officer, 1st Choice Mortgage of Oregon
Albany, Oregon 2003-2010**

- Licensed mortgage broker originating mortgage loans.
- Responsibilities including meeting with loan applicants, assessing their needs and implementing the right loan product to meet that need.
- Processing of the mortgage loans, including prequalification, gathering information and utilizing an automated system for underwriting each file in order to obtain final loan approval.
- Understanding and implementing the guidelines for FHA, VA and Conventional loan financing.
- Maintaining loan files that meet both State and Federal Lending compliance guidelines.

**Processing Manager, Pacific Guarantee Mortgage
Albany, Oregon 2001-2003**

- Providing Supervision over the processing department for mortgage lending institution.
- Provide training and support to a team of 12+ loan officers and processing support staff .
- Processing each mortgage file from initial origination by loan officers to completion of the loan process. This included all types of mortgage loans including Conventional, FHA & VA.

**Processing Manager, Mortgage One
Albany, Oregon 1997-2001**

- Provided support to 6+ loan originators in the processing of their mortgage loans..
- Trained new processing staff in all aspects of processing mortgage loan products available including Conventional, FHA and VA loans.

**Processor/Closer, US Bank
Albany, Oregon 1990-1997**

- Loan Processor/Closer for branch of US Bank.
- Processed paperwork for loan officers and managers. Including gather information from borrowers, sending out verifications, ordering appraisals and working with underwriters to get all final documentation needed for loans.
- Closed loans for loan officers and managers. Including preparing all closing documents necessary for the loan file, working with title and escrow companies to get the documentation signed, reviewing all paperwork and disbursing funds.

EDUCATION/LICENSING/CERTIFICATIONS

- Mortgage Origination Licensing – ML #245196
- MGIC – Evaluating the Self-Employed Borrower training
- MGIC – Appraisal Underwriting Training
- Completed 20 hours of on-line training and continuing education for mortgage originators to obtain licensing and 10 hours of continuing education completed annually.
- NCHCEC Certification in Foreclosure Intervention and Default Counseling
- NCHCEC Certification in NeighborWorks® Homebuyer Education
- NCHCEC Certification in Homeownership Counseling
- NCHCEC Certification in Homeownership Counseling for Program Managers
- Certification in Financial Capabilities from NeighborWorks® America
- HUD Housing Counseling Certification

Russell J. La Rosa Snyder

rsnyder0609@gmail.com — (541) 981-1382 — 2678 S 12th St., Lebanon, OR 97355

Experience:

Home Repair Coordinator, DevNW, Corvallis, OR
current

01/2022 -

- Conduct site visits of client homes and create a scope of work based on project viability and available funding for the client to use to obtain contractor bids
- Monitor project expenditures and progress and establish mechanisms for ensuring projects are completed on time and within budget.
- Maintain compliance and ensure implementation of and adherence to federal, state, and local codes, regulation, and policies as they pertain to funding/code requirements and internal policies
- Support and advocate for the homeowner as they navigate the home repair program

Spanish Tutor, Linn-Benton Community College, Albany, OR

07/2021 - current

- Provide in-person and online instruction to 100 and 200 level Spanish students
- Work with the student to create a plan for the lesson including a plan for continued success after the lesson
- Build student confidence by letting them actively guide the lesson
- Continued development of language and tutoring skills to best serve the student

Stay-At-Home Father, Lebanon, OR

05/2020 - 01/2022

- Plan, purchase, and cook meals for family, including our child, for the week
- Ensure developmental goals of our baby are being met with creative and interactive activities
- Provide a reliable, caring, and nurturing environment for our child
- Maintain a clean and safe home

Construction Crew Leader, Habitat for Humanity, Durham, NC
AmeriCorps National Service Member

08/2017 - 07/2018

- Work closely with a small team doing critical home repairs for homeowners in Durham County
- Maintain professional relationship with homeowner to ensure repairs work best for them
- Offer creative solutions to the unique construction problems associated with working on a broad type of homes
- Have basic knowledge of framing, roofing, plumbing, electrical, drywall, finish carpentry

Stewardship and Education Outreach Coordinator, Ellerbe Creek Watershed Association, Durham, NC
AmeriCorps National Service Member, Conservation Trust for North Carolina

3/2017 - 7/2017

- Manage volunteer workdays on ECWA's preserves involving invasive plant removal, trash cleanup, trail maintenance
- Created online shared/living document to connect volunteers with preserve maintenance needs
- Install green infrastructure, rain gardens and bio retention areas, at private homes and schools in Durham
- Lead K-12 students and adults on educational trips around preserves focusing on the local environment

Domestic Purchasing Agent, KAI USA, Ltd., Tualatin, OR

3/2012 - 7/2016

- Review material demand for parts purchased domestically and coordinate with vendors to ensure timely material arrival
- Build and maintain business relationships with vendors
- Communicate with multiple departments within company to ensure product goals are achieved
- Develop and implement VMI system for packaging and MRO items used in the factory
- Played a central role in packaging quality control by instituting parameters for production

Russell J. La Rosa Snyder

rsnyder0609@gmail.com — (541) 981-1382 — 2678 S 12th St., Lebanon, OR 97355

Education:

Linn-Benton Community College	9/2019 - current
• 2 years of Spanish language	
University of Oregon – Eugene, OR	9/2007 - 12/2010
• Bachelor of Arts, Major: Sociology, Minor: Ethnic Studies, GPA 3.3	
• 30 credit hours of study in Portuguese + 9 credit hours, self-study Portuguese	
West Albany High School – Albany, OR	9/2001 - 6/2005
• High School Diploma	

Volunteer Service:

Oregon Department of Fish and Wildlife	11/2018 - Current
• Conduct stream surveys assessing fish reproduction health	
• Teach students how to ethically fish, interact with nature	
Habitat for Humanity – Durham, NC	10/2016 - 2/2017
• Work in teams and individually to complete basic construction tasks-building a deck, installing siding, molding, etc.	
Tualatin River National Wildlife Refuge Volunteer – Tualatin, OR	6/2015 - 6/2016
• Worked with teams in the removal of invasive fauna & planting of native plants under the direction of a refuge biologist	
• Maintained property for planting survival including use of backpack sprayer and weed eater	

References:

Will Everhart, Repairs Manager, Habitat for Humanity, Durham – (919) 717-9971 - WEverhart@durhamhabitat.org
Samantha Reeves, Executive Director, Walnut Hills Redevelopment Foundation - (513) 828-8067 -
samantha@walnuthillsrf.org
Sandra Gable, Purchasing Manager, KAI USA, Ltd. – (503) 367-2587 – sgable@kai-usa.com
Matt Staton, Owner/President, Filter Care – (541) 979-2232 – mstaton36@gmail.com

Dev NW Consolidated
Statement of Activities-Board Approved Budget *

	Q1 2022	Q2 2022	Q3 2022	Q4 2022	Total 2022
Support and Revenue					
Support					
Government Grants	\$ 671,088	\$ 554,756	\$ 563,011	\$ 300,251	\$ 2,089,105
Private Grants	5,000	-	132,239		137,239
Sponsorships/Donations	35,900	49,750	63,600	57,250	206,500
Total Support	\$ 711,988	\$ 604,506	\$ 758,850	\$ 357,501	\$ 2,432,844
Revenue					
Rental Properties	\$ 399,763	\$ 399,763	\$ 399,763	399,763	\$ 1,599,051
Development Fees	-	-	-	-	-
Contract Revenue	353,001	769,877	492,225	520,671	2,135,775
Contract Admin Fee CLW	102,000	102,000	102,000	102,000	408,000
Interest Income	35,375	375	375	137,812	173,937
Prop Management/Resident Service Fees	11,399	11,399	11,399	85,946	120,141
Other Income(Misc., In-Kind, Camas Commons Activity)	41,306	47,306	38,106	49,081	175,799
Total Revenue	\$ 942,844	\$ 1,330,720	\$ 1,043,867	\$ 1,295,273	\$ 4,612,703
Total Support and Revenue	\$ 1,654,831	\$ 1,935,225	\$ 1,802,717	\$ 1,652,774	\$ 7,045,547
Expenses					
Personnel	\$ 1,093,722	\$ 1,093,722	\$ 1,093,722	\$ 1,086,222	4,367,389
Professional Services	53,612	31,372	70,345	63,812	219,139
Occupancy	119,596	119,596	119,596	119,596	478,383
Occupancy Pass Thru-Rent Assistance	132,842	132,842	132,842	132,842	531,370
Property Management	36,225	36,225	36,225	36,225	144,901
Board, Staff, Volunteer Exp	19,318	19,628	24,558	19,252	82,757
Materials, Supplies & Equipment	15,868	15,818	15,368	15,388	62,443
Maintenance & Repair	72,736	72,236	72,236	75,036	292,242
Advertising & Marketing	1,833	1,833	1,833	1,833	7,330
Pass Thru Grants to Partners	97,464	115,814	120,464	50,646	384,388
Client Assistance	30,414	30,414	30,414	30,414	121,656
Interest & Fees	49,010	49,160	49,080	49,040	196,290
Depreciation/Amortization	106,854	106,854	106,854	106,854	427,418
Other Expenses (Insurance, Motor Pool, Postage, etc)	44,877	47,910	44,877	45,627	183,290
Total Expenses	\$ 1,874,371	\$ 1,873,424	\$ 1,918,414	\$ 1,832,787	\$ 7,498,997
Operating Profit/(Loss)	\$ (219,540)	\$ 61,801	\$ (115,697)	\$ (180,014)	\$ (453,450)
Carryover from 2021-funding covering multiple years	145,008	145,008	145,008	145,008	580,032
NWA -PreDev Support	75,000	-	-	-	75,000
IDA Match/Financial Wellbeing	400,000	-	400,000	-	800,000
CDBG Lebanon - Rehab Lending (offset is Rehab loan on SOFP)	70,000	70,000	136,170	-	276,170
Additional Sources of Revenue	\$ 545,000	\$ 70,000	\$ 536,170	\$ -	\$ 1,151,170
Uses of Non-Operating Revenue:					
IDA Graduations Processed	(200,000)	(200,000)	(200,000)	(200,000)	(800,000)
Rehab Lending Admin Fees paid to Admin/Ops	(74,250)	(89,250)	(111,750)	(107,000)	(382,250)
Additional Sources net of Uses	\$ 270,750	\$ (219,250)	\$ 224,420	\$ (307,000)	\$ (31,080)
Net Change before CLW (Including 2021 Carryover)	\$ 196,218	\$ (12,441)	\$ 253,731	\$ (342,006)	\$ 95,502
Community Lending Works:					
Operating Profit/(Loss)	(43,616)	(79,928)	37,350	(107,500)	(193,694)
State/County/Other Pass Thru Grant Funding	25,000	250,000	450,000	-	725,000
State/County/Other Pass Thru Grants Distributed	(25,000)	(250,000)	(450,000)	-	(725,000)
Small Dollar Loan Program - Loan Loss Reserve Grant		140,000			140,000
CED Grants	68,000	-	-	-	68,000

**Dev NW Consolidated
Statement of Activities-Board Approved Budget**

	Q1 2022	Q2 2022	Q3 2022	Q4 2022	Total 2022
CDFI Grant	446,250				446,250
Total CLW Profit/(Loss) -Change in Net Assets	\$ 470,634	\$ 60,072	\$ 37,350	\$ (107,500)	\$ 460,556
CLW Carryover from 2021 CDFI and Private Grant funds that cover multiple years	89,445	39,445	39,445	39,445	\$ 207,780
Consolidated DevNW & CLW- Profit/(Loss) change in Net Assets	\$ 756,297	\$ 87,076	\$ 330,526	\$ (410,060)	\$ 763,838

*DevNW's Board of Directors does not meet in December. As a result, the 2023 Operating Budget is not yet available . The Board will approve the 2023 Operating Budget on January 31, 2023.

2022 Budget					
Q1 2022	Q2 2022	Q3 2022	Q4 2022	Total 2022	
\$ 671,088	\$ 554,756	\$ 563,011	\$ 300,251	\$ 2,089,105	
5,000	-	132,239		137,239	
35,900	49,750	63,600	57,250	206,500	
\$ 711,988	\$ 604,506	\$ 758,850	\$ 357,501	\$ 2,432,844	
\$ 399,763	\$ 399,763	\$ 399,763	\$ 399,763	\$ 1,599,051	
-	-	-	-	-	
353,001	769,877	492,225	520,671	2,135,775	
102,000	102,000	102,000	102,000	408,000	
35,375	375	375	137,812	173,937	
11,399	11,399	11,399	85,946	120,141	
41,306	47,306	38,106	49,081	175,799	
\$ 942,844	\$ 1,330,720	\$ 1,043,867	\$ 1,295,273	\$ 4,612,703	
\$ 1,654,831	\$ 1,935,225	\$ 1,802,717	\$ 1,652,774	\$ 7,045,547	
\$ 1,093,722	\$ 1,093,722	\$ 1,093,722	\$ 1,086,222	\$ 4,367,389	
53,612	31,372	70,345	63,812	219,139	
119,596	119,596	119,596	119,596	478,383	
132,842	132,842	132,842	132,842	531,370	
36,225	36,225	36,225	36,225	144,901	
19,318	19,628	24,558	19,252	82,757	
15,868	15,818	15,368	15,388	62,443	
72,736	72,236	72,236	75,036	292,242	
1,833	1,833	1,833	1,833	7,330	
97,464	115,814	120,464	50,646	384,388	
30,414	30,414	30,414	30,414	121,656	
49,010	49,160	49,080	49,040	196,290	
106,854	106,854	106,854	106,854	427,418	
44,877	47,910	44,877	45,627	183,290	
\$ 1,874,371	\$ 1,873,424	\$ 1,918,414	\$ 1,832,787	\$ 7,498,997	
\$ (219,540)	\$ 61,801	\$ (115,697)	\$ (180,014)	\$ (453,450)	
145,008	145,008	145,008	145,008	580,032	
75,000	-	-	-	75,000	
400,000	-	400,000	-	800,000	
70,000	70,000	136,170	-	276,170	
\$ 545,000	\$ 70,000	\$ 536,170	\$ -	\$ 1,151,170	

Dev NW Consolidated
Statement of Activities
For the seven and eight months ending July and August 2022 compared to 2022 Budget

	June Cascade Rentals	July 2022	August 2022	YTD 8/31/22	% of Budget	Total 2022 Budget
IDA Graduations Processed	-	(58,284)	(104,692)	(742,464)	92.81%	(800,000)
OHCS VET CET DPA/Financial Wellbeing Loans Processed	-	-	-	-	0.00%	(382,250)
Additional Sources net of Uses	\$ -	\$ (67,209)	\$ 261,908	\$ 1,459,195	-4694.96%	\$ (31,080)
Net Change before CLW	\$ (6,794)	\$ 58,831	\$ 125,899	\$ 1,352,426	1416.12%	\$ 95,502
Community Lending Works:						
Operating Profit/(Loss)		(74,276)	(61,075)	(179,395)	7.38%	(193,694)
State/County CDBG Funding		(17,500)	-	262,275	36.18%	725,000
State/County CDBG Grants				(262,275)	36.18%	(725,000)
Small Dollar Loan Program - Loan Loss Reserve Grant				146,400	104.57%	140,000
CDFI Grant				446,250	100.00%	446,250
CED Grant				85,000	125.00%	68,000
						-
Total CLW Profit/(Loss) -Change in Net Assets	\$ -	\$ (91,776)	\$ (61,075)	\$ 498,255	108.19%	\$ 460,556
CLW Carryover from 2021 CDFI and Private Grant funds that cover multiple years						
Consolidated DevNW & CLW- Profit/(Loss) change in Net Assets	\$ (6,794)	\$ (32,945)	\$ 64,824	\$ 1,850,681	242.29%	\$ 763,838

2022 Budget					
Q1 2022	Q2 2022	Q3 2022	Q4 2022	Total 2022	
(200,000)	(200,000)	(200,000)	(200,000)	(800,000)	
(74,250)	(89,250)	(111,750)	(107,000)	(382,250)	
\$ 270,750	\$ (219,250)	\$ 224,420	\$ (307,000)	\$ (31,080)	
\$ 196,218	\$ (12,441)	\$ 253,731	\$ (342,006)	\$ 95,502	
(43,616)	(79,928)	37,350	(107,500)	(193,694)	
25,000	250,000	450,000	-	725,000	
(25,000)	(250,000)	(450,000)	-	(725,000)	
-	140,000	-	-	140,000	
446,250	-	-	-	446,250	
68,000	-	-	-	68,000	
				-	
\$ 470,634	\$ 60,072	\$ 37,350	\$ (107,500)	\$ 460,556	
89,445	39,445	39,445	39,445	207,780	
\$ 756,297	\$ 87,076	\$ 330,526	\$ (410,060)	\$ 763,838	

DevNW
Statement of Financial Position
For the Comparative Periods August 31, 2022 and June 30, 2022

	<u>August 31, 2022</u>	<u>June 30, 2022</u>
Assets		
Current Assets		
Unrestricted Cash	\$ 1,356,518	\$ 1,403,827
Rental Property Cash	284,605	287,580
Development Designated Funds	358,448	302,109
Board Designated Funds	460,554	460,615
Restricted Cash (IDA, Rehab Lending, DPA)	4,699,389	4,237,002
Accounts Receivable	1,190,532	849,304
Prepaid Expenses	101,203	117,811
Total Current Assets	\$ 8,451,249	\$ 7,658,247
Fixed Assets		
Land	\$ 5,840,237	\$ 5,840,237
Buildings	15,646,445	15,646,445
Furniture & Fixtures	695,504	694,306
Projects in Progress	5,898,883	4,830,666
CLT Land	197,208	197,208
Loan Fees	192,792	192,792
Accumulated Depreciation	(5,784,348)	(5,702,817)
Total Fixed Assets	\$ 22,686,720	\$ 21,698,836
Long-term Assets		
Rental Property Reserve Cash	\$ 518,359	\$ 493,387
Notes Receivable	13,493,295	13,570,256
Deposits/Depreciation Reserve	139,547	143,742
LIHTC Loan Interest Receivable	2,182,908	2,182,908
Allowance For Loan Loss Reserve (Rehab loans)	(51,893)	(51,893)
Beneficial Interest CLW	5,725,784	5,878,635
Investments in Related Entities (LIHTC)	1,058,408	1,058,407
Total Long-term Assets	\$ 23,066,408	\$ 23,275,443
Total Assets	\$ 54,204,377	\$ 52,632,526
Liabilities		
Current Liabilities		
Accounts Payable	\$ 525,517	\$ 460,415
Accrued Payroll Liabilities	469,264	483,456
Deferred Rent, Deposits, Revenue	12,446	0
Mortgage Interest Payable	67,793	67,750
Current Notes Payable	141,344	141,344
Total Current Liabilities	\$ 1,216,364	\$ 1,152,966
Long-term Liabilities		
Notes Payable-Forgivable	4,058,344	3,326,552
Notes Payable	8,127,700	7,376,123
Total Liabilities	\$ 13,402,408	\$ 11,855,641
Net Assets		
Beginning Net Assets		
Net Assets-Unrestricted	21,985,105	21,985,105
Net Assets- Donor Restricted	16,966,183	16,966,183
Total Beginning Net Assets	\$ 38,951,288	\$ 38,951,288
		0.00
Cash/Loan Transfer from CSC-Rehab		
Current YTD Net Assets	1,850,681	1,825,596
Total Current YTD Net Assets	\$ 1,850,681	\$ 1,825,596
Total Net Assets	\$ 40,801,969	\$ 40,776,885
Total Liabilities and Net Assets	\$ 54,204,377	\$ 52,632,526

Dev NW
Recap of Statement of Financial Position Metrics Compared to NeighborWorks Affiliate Benchmark
For the YTD period ended August 2022

Liquidity Measures:

		Dev NW		NWA Peer		
Current Ratio	(1)	6.95		2.08		Good
Quick/Cash Ratio	(2)	2.02		1.1		Caution
Total Days Cash	(3)	126.69	4.22	136.00	4.53	Concern

Borrowing Power:

Liabilities/Net Assets	(4)	32.8%		86.5%
Current Liab/Net Assets	(5)	3.0%		10.3%

Profit/(loss):

	YTD Actual	Better/(worse) than Budget
Statement of Activities-Operating Profit/(loss) to budget	(106,768.09)	93,292.14
Statement of Activities-Overall Profit/(loss) to budget	1,850,681.41	2,065,099.98

Current Ratio:	(1)	How quickly an agency can convert its short-term assets into cash to pay its short-term liabilities. Important to watch for large decreases in this number over time. Confirm assets listed as current are collectible. The higher the ratio, the more liquid the organization. Generally, a "health" organization will have a current ratio of at least 1.
Quick/Cash Ratio:	(2)	The quick ratio is an indicator of a company's short-term liquidity. This ratio measures an organization's ability to meet it's short term obligations with its most liquid assets. A ratio of 1.5 means that a company has \$1.50 of liquid assets available to cover \$1.00 of current liabilities.
Cash on hand (days):	(3)	How long, in days, the organization could meet operating expenses without receiving new income. Organizations typically strive to maintain at least 90-180 days cash on hand.
Debt Ratio:	(4)	The debt to total net assets ratio is an indicator of financial leverage. It tells you the percentage of total assets that were financed by creditors, liabilities, debt.
Current Liabilities to Net Assets	(5)	A measure of the extent to which the organization is using creditor funds versus owned investments to finance the entity. A ratio of 50% or higher may indicate inadequate owned investment or an extended accounts payable period.

**Dev NW Consolidated
Statement of Activities**
For the nine months ending September 2022 compared to 2022 Budget

					2022 Budget				
	September	YTD 9/30/22	% of Budget	Total 2022 Budget	Q1 2022	Q2 2022	Q3 2022	Q4 2022	Total 2022
Support and Revenue			75.00%						
Support									
Government Grants	\$ 175,349	\$ 1,576,772	75.48%	\$ 2,089,105	\$ 671,088	\$ 554,756	\$ 563,011	\$ 300,251	\$ 2,089,105
Private Grants	-	112,250	81.79%	137,239	5,000	-	132,239		137,239
Sponsorships/Donations	925	288,750	139.83%	206,500	35,900	49,750	63,600	57,250	206,500
Total Support	\$ 176,274	\$ 1,977,771	81.29%	\$ 2,432,844	\$ 711,988	\$ 604,506	\$ 758,850	\$ 357,501	\$ 2,432,844
Revenue									
Rental Properties	\$ 132,446	\$ 1,108,140	69.30%	\$ 1,599,051	\$ 399,763	\$ 399,763	\$ 399,763	\$ 399,763	\$ 1,599,051
Development Fees	-	-	0.00%	-	-	-	-	-	-
Contract Revenue	315,091	2,009,685	94.10%	2,135,775	353,001	769,877	492,225	520,671	2,135,775
Contract Admin Fee CLW	34,000	306,000	75.00%	408,000	102,000	102,000	102,000	102,000	408,000
Interest Income	638	7,616	4.38%	173,937	35,375	375	375	137,812	173,937
Property Management Fees (Resident Service Fees)	3,800	34,196	28.46%	120,141	11,399	11,399	11,399	85,946	120,141
Other Income(Misc., In-Kind, Camas Commons Activity)	32,504	178,283	101.41%	175,799	41,306	47,306	38,106	49,081	175,799
Total Revenue	\$ 518,478	\$ 3,643,921	79.00%	\$ 4,612,703	\$ 942,844	\$ 1,330,720	\$ 1,043,867	\$ 1,295,273	\$ 4,612,703
Total Support and Revenue	\$ 694,752	\$ 5,621,693	79.79%	\$ 7,045,547	\$ 1,654,831	\$ 1,935,225	\$ 1,802,717	\$ 1,652,774	\$ 7,045,547
Expenses									
Personnel	\$ 358,401	\$ 3,090,142	70.75%	\$ 4,367,389	\$ 1,093,722	\$ 1,093,722	\$ 1,093,722	\$ 1,086,222	\$ 4,367,389
Professional Services	15,224	172,339	78.64%	219,139	53,612	31,372	70,345	63,812	219,139
Occupancy	52,048	381,561	79.76%	478,383	119,596	119,596	119,596	119,596	478,383
Occupancy YHDP Program	73,290	418,755	78.81%	531,370	132,842	132,842	132,842	132,842	531,370
Prior Year Rent Assistance Pay Out	3,553	32,819	0.00%	-					
Prop Mgmt./Rehab Admin Exp	9,305	78,819	54.40%	144,901	36,225	36,225	36,225	36,225	144,901
Board, Staff, Volunteer Exp	14,706	89,846	108.57%	82,757	19,318	19,628	24,558	19,252	82,757
Materials, Supplies & Equipment	2,292	131,646	210.83%	62,443	15,868	15,818	15,368	15,388	62,443
Maintenance & Repair	30,554	166,518	56.98%	292,242	72,736	72,236	72,236	75,036	292,242
Advertising & Marketing	705	9,933	135.50%	7,330	1,833	1,833	1,833	1,833	7,330
Pass Thru Grants to Partners	12,351	273,960	71.27%	384,388	97,464	115,814	120,464	50,646	384,388
Client Assistance	70,504	225,225	185.13%	121,656	30,414	30,414	30,414	30,414	121,656
Interest & Fees	16,308	138,816	70.72%	196,290	49,010	49,160	49,080	49,040	196,290
Depreciation/Amortization	41,447	353,843	82.79%	427,418	106,854	106,854	106,854	106,854	427,418
Other Expenses (Insurance, Motor Pool, Postage, etc)	35,111	198,186	108.13%	183,290	44,877	47,910	44,877	45,627	183,290
Total Expenses	\$ 735,798	\$ 5,762,407	76.84%	\$ 7,498,997	\$ 1,874,371	\$ 1,873,424	\$ 1,918,414	\$ 1,832,787	\$ 7,498,997
Operating Profit/(Loss)	\$ (41,046)	\$ (140,715)	31.03%	\$ (453,450)	\$ (219,540)	\$ 61,801	\$ (115,697)	\$ (180,014)	\$ (453,450)
Carryover from 2021-funding covering multiple years				580,032	145,008	145,008	145,008	145,008	580,032
NWA -PreDev Support		120,000	160.00%	75,000	75,000	-	-	-	75,000
IDA Match/Financial Wellbeing	-	1,211,600	151.45%	800,000	400,000	-	400,000	-	800,000
CDBG Lebanon/Sweethome - Rehab Lending (offset is Rehab loan on SOFP)	-	230,320	83.40%	276,170	70,000	70,000	136,170	-	276,170
Development CLT Funding	-	600,000							
CDBG - City of Albany	-	39,740							

**Dev NW Consolidated
Statement of Activities**
For the nine months ending September 2022 compared to 2022 Budget

	September	YTD 9/30/22	% of Budget	Total 2022 Budget
Additional Sources of Revenue	\$ -	\$ 2,201,659	191.25%	\$ 1,151,170
Uses of Non-Operating Revenue:				
IDA Graduations Processed	(64,352)	(806,817)	100.85%	(800,000)
OHCS VET CET DPA/Financial Wellbeing Loans Processed	-	-	0.00%	(382,250)
Additional Sources net of Uses	\$ (64,352)	\$ 1,394,842	-4487.91%	\$ (31,080)
Net Change before CLW	\$ (105,399)	\$ 1,254,128	1313.19%	\$ 95,502
Community Lending Works:				
Operating Profit/(Loss)	(15,005)	(190,650)	1.57%	(193,694)
State/County CDBG Funding	-	262,275	36.18%	725,000
State/County CDBG Grants		(262,275)	36.18%	(725,000)
Small Dollar Loan Program - Loan Loss Reserve Grant		146,400	104.57%	140,000
CDFI Grant		446,250	100.00%	446,250
CED Grant		85,000	125.00%	68,000
				-
Total CLW Profit/(Loss) -Change in Net Assets	\$ (15,005)	\$ 487,000	105.74%	\$ 460,556
CLW Carryover from 2021 CDFI and Private Grant funds that cover multiple years				
Consolidated DevNW & CLW- Profit/(Loss) change in Net Asset:	\$ (120,403)	\$ 1,741,128	227.94%	\$ 763,838

2022 Budget				
Q1 2022	Q2 2022	Q3 2022	Q4 2022	Total 2022
\$ 545,000	\$ 70,000	\$ 536,170	\$ -	\$ 1,151,170
(200,000)	(200,000)	(200,000)	(200,000)	(800,000)
(74,250)	(89,250)	(111,750)	(107,000)	(382,250)
\$ 270,750	\$ (219,250)	\$ 224,420	\$ (307,000)	\$ (31,080)
\$ 196,218	\$ (12,441)	\$ 253,731	\$ (342,006)	\$ 95,502
(43,616)	(79,928)	37,350	(107,500)	(193,694)
25,000	250,000	450,000	-	725,000
(25,000)	(250,000)	(450,000)	-	(725,000)
-	140,000	-	-	140,000
446,250	-	-	-	446,250
68,000	-	-	-	68,000
				-
\$ 470,634	\$ 60,072	\$ 37,350	\$ (107,500)	\$ 460,556
89,445	39,445	39,445	39,445	207,780
\$ 756,297	\$ 87,076	\$ 330,526	\$ (410,060)	\$ 763,838

DevNW
Statement of Financial Position
For the Comparative Periods September 30, 2022 and August 31, 2022

	<u>Sept 30, 2022</u>	<u>August 31, 2022</u>
Assets		
Current Assets		
Unrestricted Cash	\$ 1,358,217	\$ 1,356,518
Rental Property Cash	288,829	284,605
Development Designated Funds	320,786	358,448
Board Designated Funds	460,523	460,554
Restricted Cash (IDA, Rehab Lending, DPA)	4,731,010	4,699,389
Accounts Receivable	467,734	891,971
Prepaid Expenses	102,209	102,133
Total Current Assets	\$ 7,729,308	\$ 8,153,618
Fixed Assets		
Land	\$ 5,845,255	\$ 5,845,525
Buildings	15,666,356	15,646,445
Furniture & Fixtures	747,123	695,504
Projects in Progress	6,365,489	5,898,557
CLT Land	197,208	197,208
Loan Fees	192,792	192,792
Accumulated Depreciation	(5,826,322)	(5,784,348)
Total Fixed Assets	\$ 23,187,900	\$ 22,691,682
Long-term Assets		
Rental Property Reserve Cash	\$ 522,366	\$ 518,359
Notes Receivable	13,403,991	13,493,295
Deposits/Depreciation Reserve	135,679	139,547
LIHTC Loan Interest Receivable	2,182,908	2,182,908
Allowance For Loan Loss Reserve (Rehab loans)	(51,893)	(51,893)
Beneficial Interest CLW	5,714,529	5,725,784
Investments in Related Entities (LIHTC)	1,058,408	1,058,408
Total Long-term Assets	\$ 22,965,989	\$ 23,066,408
Total Assets	\$ 53,883,197	\$ 53,911,708
Liabilities		
Current Liabilities		
Accounts Payable	\$ 574,076	\$ 526,447
Accrued Payroll Liabilities	465,410	469,264
Deferred Rent, Deposits, Revenue	-	12,446
Mortgage Interest Payable	67,807	67,793
Current Notes Payable	141,344	141,344
Total Current Liabilities	\$ 1,248,637	\$ 1,217,294
Long-term Liabilities		
Notes Payable-Forgivable	4,058,344	4,058,344
Notes Payable	8,184,500	8,127,700
Total Liabilities	\$ 13,491,481	\$ 13,403,338
Net Assets		
Beginning Net Assets		
Net Assets-Unrestricted	22,459,289	22,459,289
Net Assets- Donor Restricted	16,191,300	16,191,300
Total Beginning Net Assets	\$ 38,650,589	\$ 38,650,589
Cash/Loan Transfer from CSC-Rehab		
Current YTD Net Assets	1,741,128	1,857,781
Total Current YTD Net Assets	\$ 1,741,128	\$ 1,857,781
Total Net Assets	\$ 40,391,716	\$ 40,508,370
Total Liabilities and Net Assets	\$ 53,883,197	\$ 53,911,708

**Dev NW Consolidated
Statement of Activities**
For the ten months ending October 2022 compared to 2022 Budget

					2022 Budget				
	October	YTD 10/31/2022	% of Budget	Total 2022 Budget	Q1 2022	Q2 2022	Q3 2022	Q4 2022	Total 2022
Support and Revenue			83.33%						
Support									
Government Grants	\$ 213,472	\$ 1,790,244	85.69%	\$ 2,089,105	\$ 671,088	\$ 554,756	\$ 563,011	\$ 300,251	\$ 2,089,105
Private Grants	-	112,250	81.79%	137,239	5,000	-	132,239		137,239
Sponsorships/Donations	850	289,600	140.24%	206,500	35,900	49,750	63,600	57,250	206,500
Total Support	\$ 214,322	\$ 2,192,094	90.10%	\$ 2,432,844	\$ 711,988	\$ 604,506	\$ 758,850	\$ 357,501	\$ 2,432,844
Revenue									
Rental Properties	\$ 132,909	\$ 1,241,049	77.61%	\$ 1,599,051	\$ 399,763	\$ 399,763	\$ 399,763	\$ 399,763	\$ 1,599,051
Development Fees	-	-	0.00%	-	-	-	-	-	-
Contract Revenue	195,620	2,205,306	103.26%	2,135,775	353,001	769,877	492,225	520,671	2,135,775
Contract Admin Fee CLW	34,000	340,000	83.33%	408,000	102,000	102,000	102,000	102,000	408,000
Interest Income	525	8,141	4.68%	173,937	35,375	375	375	137,812	173,937
Property Management Fees (Resident Service Fees)	3,800	37,995	31.63%	120,141	11,399	11,399	11,399	85,946	120,141
Other Income(Misc., In-Kind, Camas Commons Activity)	6,568	184,851	105.15%	175,799	41,306	47,306	38,106	49,081	175,799
Total Revenue	\$ 373,421	\$ 4,017,342	87.09%	\$ 4,612,703	\$ 942,844	\$ 1,330,720	\$ 1,043,867	\$ 1,295,273	\$ 4,612,703
Total Support and Revenue	\$ 587,743	\$ 6,209,436	88.13%	\$ 7,045,547	\$ 1,654,831	\$ 1,935,225	\$ 1,802,717	\$ 1,652,774	\$ 7,045,547
Expenses									
Personnel	\$ 369,563	\$ 3,459,705	79.22%	\$ 4,367,389	\$ 1,093,722	\$ 1,093,722	\$ 1,093,722	\$ 1,086,222	\$ 4,367,389
Professional Services	834	173,173	79.02%	219,139	53,612	31,372	70,345	63,812	219,139
Occupancy	31,236	412,797	86.29%	478,383	119,596	119,596	119,596	119,596	478,383
Occupancy YHDP Program	120,826	539,581	101.55%	531,370	132,842	132,842	132,842	132,842	531,370
Prior Year Rent Assistance Pay Out	16,257	49,076	0.00%	-					
Prop Mgmt./Rehab Admin Exp	9,375	88,194	60.87%	144,901	36,225	36,225	36,225	36,225	144,901
Board, Staff, Volunteer Exp	9,269	99,115	119.77%	82,757	19,318	19,628	24,558	19,252	82,757
Materials, Supplies & Equipment	21,683	153,330	245.55%	62,443	15,868	15,818	15,368	15,388	62,443
Maintenance & Repair	10,771	177,289	60.66%	292,242	72,736	72,236	72,236	75,036	292,242
Advertising & Marketing	1,800	11,733	160.06%	7,330	1,833	1,833	1,833	1,833	7,330
Pass Thru Grants to Partners	4,431	278,392	72.42%	384,388	97,464	115,814	120,464	50,646	384,388
Client Assistance	72,566	297,791	244.78%	121,656	30,414	30,414	30,414	30,414	121,656
Interest & Fees	16,397	155,214	79.07%	196,290	49,010	49,160	49,080	49,040	196,290
Depreciation/Amortization	41,546	395,389	92.51%	427,418	106,854	106,854	106,854	106,854	427,418
Other Expenses (Insurance, Motor Pool, Postage, etc)	23,748	221,933	121.08%	183,290	44,877	47,910	44,877	45,627	183,290
Total Expenses	\$ 750,303	\$ 6,512,710	86.85%	\$ 7,498,997	\$ 1,874,371	\$ 1,873,424	\$ 1,918,414	\$ 1,832,787	\$ 7,498,997
Operating Profit/(Loss)	\$ (162,560)	\$ (303,274)	66.88%	\$ (453,450)	\$ (219,540)	\$ 61,801	\$ (115,697)	\$ (180,014)	\$ (453,450)
Carryover from 2021-funding covering multiple years				580,032	145,008	145,008	145,008	145,008	580,032
NWA -PreDev Support		120,000	160.00%	75,000	75,000	-	-	-	75,000
IDA Match/Financial Wellbeing	-	1,211,600	151.45%	800,000	400,000	-	400,000	-	800,000
CDBG Lebanon/Sweethome - Rehab Lending (offset is Rehab loan on SOFP)	92,355	322,674	116.84%	276,170	70,000	70,000	136,170	-	276,170

**Dev NW Consolidated
Statement of Activities**
For the ten months ending October 2022 compared to 2022 Budget

	YTD		% of Budget	Total 2022 Budget	2022 Budget				
	October	10/31/2022			Q1 2022	Q2 2022	Q3 2022	Q4 2022	Total 2022
Development CLT Funding	-	600,000							
CDBG - City of Albany	58,872	98,612							
Additional Sources of Revenue	\$ 151,227	\$ 2,352,886	204.39%	\$ 1,151,170	\$ 545,000	\$ 70,000	\$ 536,170	\$ -	\$ 1,151,170
Uses of Non-Operating Revenue:									
IDA Graduations Processed	(51,775)	(858,592)	107.32%	(800,000)	(200,000)	(200,000)	(200,000)	(200,000)	(800,000)
OHCS VET CET DPA/Financial Wellbeing Loans Processed	-	-	0.00%	(382,250)	(74,250)	(89,250)	(111,750)	(107,000)	(382,250)
Additional Sources net of Uses	\$ 99,452	\$ 1,494,295	-4807.90%	\$ (31,080)	\$ 270,750	\$ (219,250)	\$ 224,420	\$ (307,000)	\$ (31,080)
Net Change before CLW	\$ (63,108)	\$ 1,191,020	1247.11%	\$ 95,502	\$ 196,218	\$ (12,441)	\$ 253,731	\$ (342,006)	\$ 95,502
Community Lending Works:									
Operating Profit/(Loss)	89,823	(100,827)	47.95%	(193,694)	(43,616)	(79,928)	37,350	(107,500)	(193,694)
State/County CDBG Funding	-	262,275	36.18%	725,000	25,000	250,000	450,000	-	725,000
State/County CDBG Grants		(262,275)	36.18%	(725,000)	(25,000)	(250,000)	(450,000)	-	(725,000)
Small Dollar Loan Program - Loan Loss Reserve Grant		146,400	104.57%	140,000	-	140,000	-	-	140,000
Ford Family Foundation - Revolving Loan Award	450,000	450,000							
CDFI Grant		446,250	100.00%	446,250	446,250	-	-	-	446,250
CED Grant		85,000	125.00%	68,000	68,000	-	-	-	68,000
				-					-
Total CLW Profit/(Loss) -Change in Net Assets	\$ 539,823	\$ 1,026,823	222.95%	\$ 460,556	\$ 470,634	\$ 60,072	\$ 37,350	\$ (107,500)	\$ 460,556
CLW Carryover from 2021 CDFI and Private Grant funds that cover multiple years					89,445	39,445	39,445	39,445	207,780
Consolidated DevNW & CLW- Profit/(Loss) change in Net Asset:	\$ 476,715	\$ 2,217,843	290.36%	\$ 763,838	\$ 756,297	\$ 87,076	\$ 330,526	\$ (410,060)	\$ 763,838

DevNW
Statement of Financial Position
For the Comparative Periods October 31, 2022 and September 30, 2022

	<u>Oct 30, 2022</u>	<u>Sept 30, 2022</u>
Assets		
Current Assets		
Unrestricted Cash	\$ 1,210,761	\$ 1,358,217
Rental Property Cash	273,055	288,829
Development Designated Funds	218,910	320,786
Board Designated Funds	460,493	460,523
Restricted Cash (IDA, Rehab Lending, DPA)	4,525,104	4,731,010
Accounts Receivable	792,054	467,734
Prepaid Expenses	99,764	102,209
Total Current Assets	\$ 7,580,141	\$ 7,729,308
Fixed Assets		
Land	\$ 5,845,785	\$ 5,845,255
Buildings	15,681,028	15,666,356
Furniture & Fixtures	747,088	747,123
Projects in Progress	6,643,073	6,365,489
CLT Land	197,208	197,208
Loan Fees	192,792	192,792
Accumulated Depreciation	(5,868,395)	(5,826,322)
Total Fixed Assets	\$ 23,438,578	\$ 23,187,900
Long-term Assets		
Rental Property Reserve Cash	\$ 534,656	\$ 522,366
Notes Receivable	13,528,376	13,403,991
Deposits/Depreciation Reserve	137,546	135,679
LIHTC Loan Interest Receivable	2,182,908	2,182,908
Allowance For Loan Loss Reserve (Rehab loans)	(51,893)	(51,893)
Beneficial Interest CLW	6,254,376	5,714,529
Investments in Related Entities (LIHTC)	1,058,408	1,058,408
Total Long-term Assets	\$ 23,644,377	\$ 22,965,989
Total Assets	\$ 54,663,096	\$ 53,883,197
Liabilities		
Current Liabilities		
Accounts Payable	\$ 523,103	\$ 574,076
Accrued Payroll Liabilities	480,881	465,410
Deferred Rent, Deposits, Revenue	26,391	-
Mortgage Interest Payable	67,815	67,807
Current Notes Payable	141,344	141,344
Total Current Liabilities	\$ 1,239,535	\$ 1,248,637
Long-term Liabilities		
Notes Payable-Forgivable	4,279,974	4,058,344
Notes Payable	8,275,156	8,184,500
Total Liabilities	\$ 13,794,665	\$ 13,491,481
Net Assets		
Beginning Net Assets		
Net Assets-Unrestricted	22,459,289	22,459,289
Net Assets- Donor Restricted	16,191,300	16,191,300
Total Beginning Net Assets	\$ 38,650,589	\$ 38,650,589
Cash/Loan Transfer from CSC-Rehab		
Current YTD Net Assets	2,217,842	1,741,128
Total Current YTD Net Assets	\$ 2,217,842	\$ 1,741,128
Total Net Assets	\$ 40,868,431	\$ 40,391,716
Total Liabilities and Net Assets	\$ 54,663,096	\$ 53,883,197

DevNW Board of Directors, January 2023

Board Member Name	Position	Member Since	Profession	Employer/Affiliation
Miguel Arellano	President	2019	Basic Needs Health Navigator	OSU
Chrystal Shearer	Secretary	2016	Education	Lincoln Elementary - Corvallis
Jin Plummer	Community LendingWorks Chair	2010	AVP/ Relationship Banking Officer	Columbia Bank
Matthew Bromley	Treasurer, Past-President	2017	Attorney	CBT Nuggets
Duane Walrod	Member	2005	Property Manager	Principal
Steve Ochs	Member	2016	Real Estate Development Director	Homes For Good
Cynthia Campobasso-LeDoux	Member	2022	Caregiver	DevNW client, Affordable Housing Resident
Daniela Alexandru-Abrams	Member	2022	Physician, Real Estate Business Owner	Mercy CHI Networks, Osprey Property Management
Christina Tran	Member	2022	Artist	Self-employed
Albert Kong	Member	2022	Baker	Wild Yeast Bakery



DEVELOPING THRIVING COMMUNITIES

DevNW, "the organization," prohibits unlawful discrimination and harassment. This policy defines these terms and provides a complaint procedure for employees who believe they have been the victims of prohibited conduct. This policy applies to all matters related to hiring, firing, transfer, promotion, benefits, compensation, and other terms and conditions of employment.

Discrimination and Workplace Harassment

It is DevNW's policy to provide a work environment free from unlawful discrimination or harassment on the basis of race, color, religion, sex, sexual orientation, national origin, marital status, age, expunged juvenile record, performance of duty in a uniformed service or physical or mental disability, or any other characteristic protected by local law, regulation, or ordinance.

It is our policy that all employees, customers, clients, contractors, and visitors to the work site are entitled to a respectful and productive work environment free from behavior, action, or language that constitutes workplace harassment or discrimination. The "workplace" includes when employees are on company premises, at a company-sponsored off site event, traveling on behalf of the company, or conducting company business, regardless of location.

The policy prohibits any conduct at work that a reasonable person in the individual's circumstances would consider unwelcome, intimidating, hostile, threatening, violent, abusive, or offensive. It also prohibits employment actions, including hiring, promotion, termination, and compensation decisions, to be taken based on a protected characteristic. This policy also prohibits any form of retaliatory action toward an employee for filing a complaint of discrimination or harassment, or for participation in an investigation of a complaint.

Workplace harassment can be based on national origin, age, sex, race, disability, religion, sexual orientation, gender identity, or gender expression. It may also encompass other forms of unwelcome, hostile, intimidating, threatening, humiliating, or violent behavior that is not necessarily illegal, but still prohibited by this policy.

Sexual harassment is a form of workplace harassment and includes, but is not limited to, the following types of conduct:

- Unwelcome sexual advances, requests for sexual favors, or other conduct of a sexual nature when such conduct is directed toward an individual because of that individual's sex and submission to such conduct is made either explicitly or implicitly a term or condition of employment; or submission to or rejection of such conduct is used as the basis for employment decisions affecting that individual.



DEVELOPING THRIVING COMMUNITIES

- Unwelcome verbal or physical conduct that is sufficiently severe or pervasive to have the purpose or effect of unreasonably interfering with work performance or creating a hostile, intimidating or offensive working environment.

Sexual Assault

Unwanted conduct of a sexual nature that is inflicted upon a person or compelled through the use of physical force, manipulation, threat, or intimidation.

Prohibited Conduct

This policy prohibits conduct based on an individual's protected class status. Although by no means all-inclusive, the following examples represent prohibited behavior:

- Physical harassment, including but not limited to unwelcome physical contact such as touching, impeding or blocking movement, or any physical interference with work;
- Verbal harassment, including but not limited to disparaging or disrespectful comments, jokes, slurs, innuendoes, teasing, and other sexual talk such as jokes, personal inquiries, persistent unwanted courting and derogatory insults;
- Nonverbal harassment, including but not limited to suggestive or insulting sounds, obscene gestures, leering or whistling;
- Visual harassment, including but not limited to displays of explicit or offensive calendars, circulation of derogatory content, posters, pictures, drawings or cartoons that reflect disparagingly upon a class of persons or a particular person; or
- Sexual harassment, as described above, including but not limited to unwelcome sexual advances, requests for favors in exchange for conduct of a sexual nature, submission to unwelcome conduct of a sexual nature in exchange for a term of employment, or other conduct of a sexual nature.

Penalties

We will not tolerate discriminatory conduct, harassment, or sexual assault. Any individual found to have engaged in such conduct may face disciplinary action up to, and including, dismissal. The company may also subject managers and supervisors who fail to report known harassment – or fail to take prompt, appropriate corrective action — to disciplinary action, including potential dismissal.



DEVELOPING THRIVING COMMUNITIES

Retaliation Protections

DevNW prohibits retaliation against any employee for filing a complaint regarding conduct in violation of this policy. DevNW will not tolerate retaliation against any employee for raising a good faith concern, for providing information related to a concern, or for otherwise cooperating in an investigation of a reported violation of this policy. Any employee who retaliates against anyone involved in an investigation is subject to disciplinary action, up to and including dismissal.

Reporting Procedure

Any employee aware of or experiencing discrimination, harassment or sexual assault in the workplace should report that information immediately to a company designee. Specifically, an employee may make the report verbally or in writing to the employee's immediate supervisor or higher management, if the employee prefers. As an alternative, an employee may report the harassment to the company's human resource office. Employees may report to any of the persons listed above, regardless of any particular chain of command. All employees are encouraged to document any incidents involving discrimination, harassment, and sexual assault as soon as possible.

Nondisclosure or Nondisparagement Agreements

Under this policy, a nondisclosure agreement is any agreement by which one or more parties agree not to discuss or disclose information regarding any complaint of work-related harassment, discrimination, or sexual assault.

A nondisparagement agreement is any agreement by which one or more parties agree not to discredit or make negative or disparaging written or oral statements about any other party or the company.

A no-rehire provision is an agreement that prohibits an employee from seeking reemployment with the company and allows a company to not rehire that individual in the future.

The company will not require an employee to enter into any agreement if the purpose or effect of the agreement prevents the employee from disclosing or discussing conduct constituting discrimination, harassment, or sexual assault.

An employee claiming to be aggrieved by discrimination, harassment, or sexual assault may, however, voluntarily request to enter into a settlement, separation, or severance agreement which contains a nondisclosure, nondisparagement, or no-rehire provision and will have at least seven days to revoke any such agreement.

Time Limitations

devNW.org



212 Main Street
Springfield, OR 97477

257 SW Madison Avenue #200
Corvallis, OR 97333

528 Cottage Street NE, Suite 304
Salem, OR 97301

421 High Street, Suite 110
Oregon City, OR 97045



DEVELOPING THRIVING COMMUNITIES

Nothing in this policy precludes any person from filing a formal grievance in accordance with a collective bargaining agreement [if applicable], the Bureau of Labor and Industries' Civil Rights Division or the Equal Employment Opportunity Commission. Note that Oregon state law requires that any legal action taken on alleged discriminatory conduct (specifically that prohibited by ORS 659A.030, 659A.082 or 659A.112) commence **no later than five years** after the occurrence of the violation. Other applicable laws may have a shorter time limitation on filing.

devNW.org



212 Main Street
Springfield, OR 97477

257 SW Madison Avenue #200
Corvallis, OR 97333

528 Cottage Street NE, Suite 304
Salem, OR 97301

421 High Street, Suite 110
Oregon City, OR 97045



Request for Applications (RFA): Community Development Block Grant Activities

Applications Due by 5:00 p.m. Thursday, January 19, 2023 (PST)

333 Broadalbin Street SW, PO Box 490, Albany, Oregon 97321-0144 | Planning 541-917-7550

EXHIBIT A: APPLICATION

5.1 Applicant Information

Applicant (organization name): Family Connections

Contact Person: Bryan Steinhauser Email: steinhb@linnbenton.edu

Mailing Address: 6500 Pacific Blvd. SW, LM-132, Albany, OR 97321

Phone #: (541) 917-4914

Agency website: <https://www.linnbenton.edu/educational-options/community-and-continuing-education/family-resources/index.php>

UEI #: QMKDAZEGH1M1 (LBCC)

EIN: 930561307 (LBCC)

Organization Mission Statement: Supporting children, families, and community partners by building innovative programming and systems that are responsible to community needs throughout our region.

5.2 Proposal Summary

Activity/Program Name: Registered Family Home-Based Child Care Expansion Project

Activity Location: Albany, OR

Proposal Summary: Increase the number of registered family child care programs in the city of Albany, seeking to subgrant CDBG funds to prospective Low-and Moderate-Income (LMI) owner/operators of home-based child care businesses, to be used for eligible expenditures associated with capital costs necessary for creating a new business, provided in conjunction with child care specific business training, and other assistance that Family Connections will provide to ensure long term business sustainability.

ACTIVITY BUDGET FOR WHICH CDBG FUNDS ARE BEING REQUESTED:

CDBG Funding Request	\$	50,000
Leveraged Funds/Resources	\$	16,000
Total Activity Budget	\$	66,000



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5.3 CDBG Application Narrative

Provide the information requested below **in a separate document** making sure the narrative corresponds to the numbers provided so the required information can be easily found to ensure a complete application. If the question does not apply to the proposed project write N/A.

Activity Description

1. Explain which priorities in Albany's 2023-2027 Consolidated Plan will be addressed by the activity.
2. Describe the community need that will be addressed by the proposed activity.
3. Explain how the activity is an effective strategy to address the identified gap in needs. Provide statistics or evidence to document the activity need.
4. Please specify which CDBG National Objective(s) will be satisfied by the proposed activity.
5. Explain how the project will promote inclusiveness and diversity. Include your agency's nondiscrimination policy for employees and clients as an attachment.
6. For faith-based organizations, explain how your agency will ensure CDBG funded activities are separate from explicitly religious activities such as worship, study of religious text, or evangelizing.

Benefit to low-income Albany residents

7. Who and how many will benefit from activity (estimate # of people, describe clients)?
8. Of these, how many are estimated to be extremely low-income (earning <30% of area median)? Is there any special emphasis on serving extremely low-income residents?

Scope of Work

9. Provide a **DRAFT SCOPE OF WORK** that outlines details about the proposed activity including all actions that will be taken to address the identified need and achieve anticipated performance measures and outcomes, and general accomplishments you intend to achieve with this activity.

Project Feasibility – Readiness to proceed

10. Please describe your readiness to proceed, whether land use or other issues are resolved and whether your organization has the administrative capacity to complete the proposed project. Describe the current organizational capacity to complete and manage the activity within the program year.
11. Please complete the schedule that follows or provide one that is applicable to the activity/project that outlines when major activities will be executed and when the project will be completed.

Organizational Capacity and Activity Sustainability

12. Describe experience and success conducting similar projects, use of federal or CDBG funds.
13. If any issues were raised during a federal program monitoring evaluation, please explain the findings and how issues were resolved.
14. Explain agency experience managing construction projects subject to Davis-Bacon and/or BOLI wage requirements and/or soliciting bids for construction projects.
15. Identify any other agencies or partners for this activity/project and define the roles and responsibilities of these partners.
16. Please explain how the agency embraces and demonstrates diversity within the organization.
17. If not fully funded, will the agency be able to pursue the activity/service (possibly at a reduced scale)?

Financial

18. Why are CDBG funds the best fit/source? Are there other sources of funding for this activity?



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5.4 Proposed Activity Budget

Provide the activity budget describing total cost, cost per task, existing (secured) project funds and unfunded costs. (DO NOT PROVIDE THE FULL AGENCY BUDGET HERE JUST THE ACTIVITY BUDGET.) Identify any and all source(s) of funding. This would include other Federal and State grants and loans, monetary donations, in-kind contributions, volunteer labor, donation of materials and supplies, etc. **Use the template provided below or your own as long as the same information is provided.**

Activity/Project Budget Summary (See 24 CFR 570 Subpart J)			
Estimated Total Cost of Activity:	\$66,000		
CDBG Funding Requested for Activity:	\$50,0000		
Total Number of People/Households Served:	10		
Total Cost per Person/Household:	\$6,100		
Total CDBG Cost per Person/Unit	\$5,0000		
Describe Source of Other Funds:	Amount	Amount Secured	Amount Tentative
Federal:	\$11,000	\$11,000	0
State:	\$50,000	\$50,000	0
Local:	\$1,250	\$1,250	\$1,250
Donations/Private:	0	0	0
Grants:	0	0	0
Loans:	0	0	0
Activity Budget Detail (Non-Development Activities)			
Specific Cost Item/Description	CDBG Amount Requested	Other Funds Amount	Total Amount CDBG + Other Sources
Licensing Fees	\$1,000	\$0	\$1,000
Start Up Materials – Safety & Business	\$6,500	\$1,500	\$8,000
Business Support/Coaching	\$	\$6,250	\$5,250
Curriculum Materials & Supplies	\$20,000	\$5,000	\$25,000
Start Up Training-1st Aid/CPR	\$0	\$750	\$750
Furnishings (tables/chairs, bookshelves, etc for children)	\$20,000	\$0	\$20,000
Shared Services Subscription-enrollment, parent fee collection	\$2,500	\$0	\$2,500



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Marketing materials	\$0	\$2,500	\$2,500
Total	\$50,000	\$16,000	\$66,000



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5.5 Staff Experience and Qualifications

Identify the names of staff or contractors participating in the proposed program or activity, their role, experience they have in this role, their title, and the expected FTE on the project. **Include in an attachment resumes for key personnel anticipated to work on the proposed program, project, or activity.** Please make sure to identify the person responsible for collecting program performance data and preparing the quarterly reports for the City.

Employee	Experience and Qualifications
Name: Lynette Wynkoop Title: Director, Family Connections FTE on This Project: 1	Director, Family Connections, Child Care Resource and Referral of Linn, Benton, and Lincoln Counties
Name: Bryan Steinhauser Title: Business Liaison, Early Learning Hub FTE on This Project: 1	Business liaison, Early Learning Hub of Linn, Benton, and Lincoln Counties



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5.3 CDBG Application Narrative

1. Priority 4, Expand economic opportunities for low- and moderate-income residents.

2. Economic development

3. A lack of early child care for children aged birth-to-five, also known as “daycare” and hereto referred to as child care, has a dramatic negative effect on employment rates in terms of recruitment, retention, poor work performance, tardiness and absenteeism.

A “Child Care Desert” is defined as a community with three or more children for every regulated child care slot. Linn County is especially suffering from this problem, with only 13% of children aged birth-to-five having potential access to a regulated child care slot, with only 7% of infant-toddlers (0-2 years old) having potential access. (*source: Oregon’s Child Care Deserts 2020: Mapping Supply by Age Group and Percentage of Publicly Funded Slots, Oregon Child Care Research Partnership, OSU, 2020, Pratt & Sektman*)

Based on 2020 Census tract information, cross referencing the total number of regulated child care slots against the total number of children aged birth-to-five with working parents, the city of Albany suffers from a shortfall of 1,429 regulated child care slots. (*source: ACS 5-Years Estimates from 2020, Tables B23008- C16002, Office of Child Care, June 29, 2022, Oregon Cascades West Council of Governments, Geographic Information Systems*)

The population of the city of Albany grew by approximately 39% from 2000 to 2020, and is expected to continue growing by 1.27% annually, which means abovementioned child care shortfalls will grow worse unless child care radically expands. (*source: City of Albany’s website*)

Millersburg is one of the fastest growing cities in Oregon but has no licensed child care programs within it, which means its residents must use child care programs in neighboring communities, primarily in Albany, increasing demand for very limited number of slots. (*sources: Albany Democrat-Herald, Growing Pains: Small-town Millersburg’s population has tripled, Sep 18, 2022; <https://findchildcareoregon.org/#find-child-care-now-button>*)

4. National Objective #1 – Benefit low- and moderate-income individuals

Subcategory Low-Moderate Clientele (LMC), Low-Mod Job Creation and Retention (LMJ)

Eligible activity of Microenterprise Assistance.

5. Family Connections will promote inclusiveness and diversity relying on its highly qualified diverse staff of bilingual speakers to communicate clearly with the citizens of Albany to identify and assist prospective child care providers, promoting pay equity, bilingual business training, aiding with the licensing requirements, providing access to computers to those needing it, and being open to feedback from all communities.

LBCC nondiscrimination policy: <https://www.linnbenton.edu/about-lbcc/administration/policies/board-policies-and-administrative-rules/1000-series-the-college/ar-1015-01.php>

6. N/A



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7. We intend to subgrant funds to ten new registered family home-based child care providers who qualify at the 51-80% threshold of the AMI, and/or to use whatever remaining funds for existing registered and certified family home-based child care providers. Due to traditional low pay associated with home-based child care positions, the majority of eligible prospective subgrantees will qualify as LMI.

8. Family Connections plans to award subgrants to 20% of applicants, or two prospective providers, who qualify as Very Low Income ($\leq 30\%$).

9. Scope of Work

A. Goal: In order to increase the overall number of child care slots in the city of Albany, Family Connections intends to increase the number of registered family child care programs, seeking to subgrant CDBG funds to prospective Low-and Moderate-Income (LMI) owner/operators of home-based child care businesses, to be used for eligible expenditures associated with capital costs necessary for creating a new business, provided in conjunction with child care specific business training and other assistance that Family Connections will provide to ensure long term business sustainability.

B. Plan of Action

1) LBCC Family Connections, partnered with the Early Learning Hub of Linn, Benton, and Lincoln Counties, is coordinating a large scale, three-county wide marketing and recruitment campaign to expand registered family child care programs, the least expensive to create, the simplest type of child care program, and with the largest pool of prospective providers.

2) Prospective providers identified and selected by Family Connections will be assisted with licensing, business training, pre-service training, and funding through a limited pool of existing grant opportunities relating to child care that can be used for eligible activities relating to capital costs. Those prospective providers who reside in the city of Albany will be eligible for CDBG funds to use in this manner.

3) If necessary, starting in March 2024, Family Connections will offer use of Albany CDBG funds to existing registered or certified home-based child care programs for use as operating cost grants (replicating the 2022 Albany CDBG small business funds administered by OCWCOG that are being used identically), as part of spend down of grant funds by the July 2024 cut off. This will assist existing child care businesses who are on the brink of closure due to financial issues, awarding them up to \$3,000 grants.

C. Deliverables

1) Using \$50,000 in Albany CDBG funds, beginning in April 2023 Family Connections will launch a recruitment drive to find, select, and provide CDBG capital cost grants of \$5,000 apiece to ten prospective child care providers in order to create new registered family child care programs.

(Oregon state regulation criteria on child care programs can be found here:

<https://oregonearlylearning.com/providers-educators/become-a-provider/licensed-childcare/>)

2) Additional CDBG leftover funds will be issued out in increments of $\leq \$3,000$ to existing registered and certified home-based child care programs in Albany to assist with eligible expenditures.



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10. Family Connections already possesses the internal capacity to administer the Albany CDBG grants. Headed by Lynnette Wynkoop, Family Connections has six full time personnel who can assist with day-to-day administration of the CDBG funds.

11. Schedule

April-June 2023: Begin targeted marketing and recruitment campaign for Linn county to find, select, and assist with licensing of registered family home-based child care programs.

July 2023-July 2024: Subgrant Albany CDBG funds for Albany residents selected as prospective providers.

March-July 2024: Advertise, select, and offer CDBG grants to existing Albany based registered and certified family home-based child care providers.

12. While Family Connections has no experience administering CDBG funds, it has assisted with grant funding for child care programs as part of its normal duties and activities, such as: Western Oregon University's Research Institute/Child Care Start Up Grant; managing funds from the Oregon Community Foundation to support Latinx providers; offering tuition assistance and application assistance during the COVID-19 Pandemic to access ARPA funds used for child care.

13. N/A

14. N/A

15. Partner Organizations

A. Early Learning Hub of Linn, Benton, and Lincoln Counties: The EL Hub's project manager is acting as the lead project manager for this project, developing the expansion project, finding funding sources, setting up training, grant writing, and providing day to day oversight.

B. Unspecified marketing firm (TBD): This organization will assist in planning and rolling out recruitment campaign to attract and find potential child care provider subgrantees in the city of Albany.

16. Family Connections embraces and demonstrates diversity through adherence to Linn-Benton Community College's Nondiscrimination and Equal Opportunity policies, with annual training for all personnel. Family Connections' staff is representative of the Albany population.

17. Other funding sources will be occasional, limited in funding, and often conditional, unlikely to benefit the city of Albany with the numbers we can provide using CDBG funds.



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18. The city of Albany is one of two communities in the region that Family Connections is responsible for who are entitlement communities to use CDBG funds to directly help increase child care availability. Already, the city of Albany has voluntarily taken the steps to use CDBG funds for child care, such as 2022 small business funds given to OCWCOG to administer. Based on Albany's Community Needs Survey results (as of Oct 17, 2022), child care was ranked as the "most important public service for low and moderate income Albany residents."

Currently, there is only one other funding source available for the entire state of Oregon to be used for capital costs for expansion of new child care programs, the Provider Services Fund, limited to \$4 million in total, so it will not last long (likely will be used up by the time 2023 CDBG becomes available). There are funds coming from Seeding Justice; however, those are also limited in total and heavily favor BIPOC, LGBTQ+, and rural applicants over LMI in cities such as Albany.

Lynnette Wynkoop
 1825 NW Grandview Dr, Albany, OR 97321
 541-619-0588
 wynkool@comcast.net

Objective	Family Connections Director	
Profile	<ul style="list-style-type: none"> • Twenty years of office experience • Ability to work independently • Goal-oriented with strong leadership capabilities. • Organized, highly motivated, and detail-directed problem solver. • Ability to work in unison with staff, volunteers, and management 	
Education	B.A., Liberal Studies, Pre-Education, Oregon State University	
Relevant Experience		
Employment	Family Connections Coordinator, <i>Family Connections</i>, Linn-Benton Community College	2019-2021
	<ul style="list-style-type: none"> • Lead Quality Improvement Specialist • Represent organization at local and state level meetings • Collect data for reporting and budgeting purposes • Approve expenditures related to cohort and focused child care networks 	
	Child Care Consultant, <i>Family Connections</i>, Linn Benton Community College, Albany OR	2008-2019
	<ul style="list-style-type: none"> • Consult with parents looking for child care, community services, and quality child care indicators. Coordinate training for child care providers and consult providers on state regulations and training requirements. General office responsibilities including multi line telephone, data entry, management of data for reporting purposes, filing, email and general computer programs. 	1996-2004
	Bilingual Educational Assistant, <i>Greater Albany Public Schools</i>, Albany OR	2006-2008
	<ul style="list-style-type: none"> • Translate and interpret for students learning English and their families. Assist with educational goals and curriculum implementation. Design services based on students' needs. 	
Leadership	LBCC Leadership, Linn Benton Community College OCCRRN Trainer Group Quality Specialist, Oregon's Quality Rating and Improvement System	

Bryan Steinhauser

375 W. Jadon Dr
Lebanon OR, 97355
(732) 757-9716
attila006@gmail.com

Summary of Qualifications

- Strong communication skills, both verbal and written
- Independence, self-discipline, planning, decision making, and outside-the-box problem solving
- Proficiency in Windows, PC, and Microsoft Office applications

Experience

Apr 2022 to present

Business Liaison/Childcare Accelerator, Early Learning Hub of Linn, Benton & Lincoln Counties

- Identify public, private and foundation/grant partners to reduce costs of creating and sustaining new, high-quality childcare in Linn, Benton & Lincoln Counties.
- Work with regional organizations/groups to track progress, resolve barriers and align public/private support and resources with priority projects. Work with oversight groups to develop strategies, identify resources and understand the regulatory environment and principles of high-quality childcare. Work to build consensus, solidify support and move projects forward. This will include identifying and overcoming obstacles such as land costs/availability, start-up costs, aligning with childcare experts to ensure high quality programs in new facilities and identifying/galvanizing other funding sources.

Aug 2021 – Apr 2021 *Owner/Operator, Datahause LLC*

- Freelance IC data input and analytics services

Oct 2019 – Jul 2021 *Compliance Liaison II, iiX - a Verisk Analytics Business (Bryan, TX)*

- Reviewed over 4,500 customer audit submissions to ensure compliance with the Fair Credit Reporting Act (FCRA), the Driver's Privacy Protection Act (DPPA), state regulations, and contractual agreements with iiX
- Conducted customer service inquiries via telephone and email regarding questions about disclosure and authorization requirements, and assisted customers with technical problems that arose with their electronic audit responses

Apr 2012 - Aug 2019 *Investigative Risk Compliance Analyst, Steele Compliance Solutions, Inc. (Walnut Creek, CA/Remote Employee)*

- Seven years of operations experience conducting open-source due diligence investigations to verify corporate risk for Fortune 500 clients, including Google, Microsoft, Cisco, Eaton, PepsiCo, and Hewlett Packard, in compliance with various government regulatory laws including the Foreign Corrupt Practices Act and other national and international laws and statutes governing Anti-Bribery and Anti-Corruption (ABAC) policies
- Extensive experience performing corporate and legal research, report writing, copy and line editing, training and mentoring of junior staff members, assistance with case management, and fulfillment of assistant/acting project management duties

May 2007 - Nov 2010 *11B Infantry, Staff Sergeant, United States Army (Joint Base Lewis McCord, WA)*

Jan 2002 - Jul 2005 *11B Infantry, Sergeant, New Jersey Army National Guard (Woodbridge, NJ)*

Jul 1997 - Jul 2001 *0311 Infantry /0151 Admin Specialist, Corporal, United States Marine Corps (Marine Corps Base Hawaii, HI)*

Education

BA Political Science/History (*Cum Laude*), Kean University (Union, NJ)

Lean Six Sigma Yellow Belt certified

US Army Advanced Leaders Course (Equivalent to mid-level management training)

US Army Primary Leaders Development Course (Equivalent to junior-level management training)

Associations

Volunteer Member, Linn County Community Impact Committee, United Way of Linn, Benton, and Lincoln Counties



Request for Applications (RFA): Community Development Block Grant Activities

Applications Due by 5:00 p.m. Thursday, January 19, 2023

333 Broadalbin Street SW, Albany, Oregon 97321-0144 | BUILDING 541-917-7553 | PLANNING 541-917-7550

Exhibit B: REQUIRED CDBG CERTIFICATIONS

If this agency (name): Family Connections is awarded funding, the agency agrees that:

1. The recipient has a DUNS # and is or will be registered in the U.S. System for Award Management at <http://sam.gov> before contract award and will update registration as necessary.
2. The recipient will provide liability insurance coverage as required by the City of Albany, and worker's compensation and payment of payroll taxes as required by Federal and State laws.
3. All expenditures must have adequate documentation and all accounting records and supporting documentation shall be available for inspection by City of Albany upon request, and funds will not be used to provide services/assistance for the same costs/losses from other funding sources.
4. All procurement (purchase) transactions regardless of whether negotiated or advertised and without regard to dollar value shall be conducted in a manner to provide maximum open free competition.
5. Financial records, support documentation, statistical records, and all other records pertinent to funding shall be retained for a period of ten years following completion of project/activity.
6. The recipient shall establish safeguards to prohibit employees from using their positions for a purpose that has the appearance of being motivated by a desire for private gain for themselves or others.
7. All materials submitted shall become public records retained by the City of Albany, except that late applications will be returned to the applicant without further review.
8. No person, on the basis of race, color, national origin, sex, gender identity, familial status, religion, disability, age, veteran status, or any other characteristic protected under applicable federal, state, or local laws should be excluded from participation in, be denied the benefit of, or be otherwise subjected to discrimination under the program or activity funded in whole or part by CDBG funds. The funding recipient agrees to furnish copies of applicable policies and procedures upon request.
9. Employment made by or resulting from CDBG funding from the City of Albany shall not discriminate against any employee or applicant on the basis of disability, age, race, color, religion, sex, or national origin.
10. None of the funds, materials, property, or services provided directly or indirectly under CDBG funding from the City of Albany shall be used for any partisan political activity, or to further the election or defeat of any candidate for public office.
11. Letter of commitment from other funding sources and/or letters of support for your project shall be furnished to the City of Albany upon request.
12. **Authorization to request funds:** I acknowledge the statements above and certify the information contained in this application is true and correct. I further understand material omission or false information contained in this application constitutes grounds for disqualification.

Lynnette Wynkoop
Signature

1/17/2023
Date

Lynnette Wynkoop, Director of CDBG
Printed Name and Title
of Linn, Benton & Lincoln Co's



Request for Applications (RFA): Community Development Block Grant Activities
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333 Broadalbin Street SW, PO Box 490, Albany, Oregon 97321-0144 | Planning 541-917-7550

Exhibit C: CONFLICT OF INTEREST CERTIFICATION

Applicant has no conflict of interests with any City of Albany appointed or elected representatives and does not employ City appointed or elected representatives or their families.

Conflict of Interest. The undersigned Applicant and each person signing on behalf of the Applicant certifies, and in the case of a sole proprietorship, partnership, or corporation, each party thereto certifies as to its own organization, under penalty of perjury, that to the best of their knowledge and belief, no member of the City Council, officer, employee, or person, whose salary is payable in whole or in part by the City, has a direct or indirect financial interest in the award of funds, or in the services to which this Application relates, or in any of the profits, real or potential, thereof, except as noted otherwise herein. The undersigned hereby submits this Application to furnish all services and activities as indicated in the Application submittal.

Furthermore, Applicant must disclose any real or perceived conflict of interest, current or past relationships with City of Albany employees, appointed or elected officials associated with this program.

Disclosure: _____

SIGNATURE OF AUTHORIZED PERSON:

(notarization is not required)

The Applicant hereby certifies that the information contained in these certifications and representations is accurate, complete, and current.

Family Connections

Applicant's Agency Name

541-917-4919

Phone Number

Lynnette Wynkoop

Signature

1/17/2023

Date

Lynnette Wynkoop, CCR Director of
Printed Name and Title Linn, Benton & Lincoln Co's

Section 3 Business or Individual (check applicable box):

☐ Yes ☐ No

Disadvantaged, Minority, Emerging Small Business (DMESB) (check applicable box):

☐ Yes ☐ No



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Exhibit D: ANTI-LOBBYING STATEMENT

The anti-lobbying provisions will apply to any person who is an employee, agent, consultant, officer, elected or appointed official of the subrecipient that is receiving CDBG or CDBG-CV funds.

Applicant certifies that:

1. No Federal funds have been paid or will be paid, by or on behalf of the applicant agency, to any person for influencing or attempting to influence an officer or employee of the awarding of any Federal, state or municipal contract, the making of any Federal or municipal grant, the making of any Federal or municipal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment or modification of any Federal, state or municipal contract, grant, loan or cooperative agreement.
2. If any funds other than Federal funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any Federal or municipal agency/department, Member of Congress, an officer or employee of Congress, an employee of a Member of Congress, Mayor, City Council member, or employee of the Mayor or a City Council member in connection with this application, contract, grant, loan or cooperative agreement, it will complete and submit Standard Form-LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions; and
3. It will require that the language of paragraph 1 and 2 of this anti-lobbying certification be included in the award documents for all subcontractor awards at all tiers.

SIGNATURE OF AUTHORIZED PERSON:

(notarization is not required)

A handwritten signature in blue ink, appearing to read "Lynnette Lynders", written over a horizontal line.

Signature

A handwritten date "1/18/2023" in blue ink, written over a horizontal line.

Date



Request for Applications (RFA): Community Development Block Grant Activities

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333 Broadalbin Street SW, Albany, Oregon 97321-0144 | BUILDING 541-917-7553 | PLANNING 541-917-7550

EXHIBIT E - APPLICANT REPRESENTATIONS AND CERTIFICATION REGARDING
DEBARMENT, SUSPENSION AND OTHER RESPONSIBILITIES

The Applicant certifies to the best of its knowledge and belief by initialing next to each statement that neither it nor any of its principals:

1. JW Are presently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from submitting bids or Applications by and federal, state or local entity, department or agency;
2. JW Have within a five-year period preceding the date of this certification been convicted of fraud or any other criminal offense in connection with obtaining, attempting to obtain, or performing a public (federal, state, or local) contract embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
3. JW Are presently indicted for or otherwise criminally charged with commission of any of the offenses enumerated in Paragraph 2 of this certification;
4. JW Have, within a five-year period preceding the date of this certification had a judgment entered against contractor or its principals arising out of the performance of a public or private contract;
5. JW Have pending in any state or federal court any litigation in which there is a claim against applicant or any of its principals arising out of the performance of a public or private contract; and
6. JW Have within a five-year period preceding the date of this certification had one or more public contracts (federal, state, or local) terminated for any reason related to contract performance or compliance.

If Applicant is unable to attest to any of the statements in this certification, Applicant shall attach an explanation to the Application. The inability to certify to all of the statements may not necessarily preclude the Applicant from award of a contract under this procurement.

SIGNATURE OF AUTHORIZED PERSON:

(notarization is not required)

Lynnette S. Gakoz
Signature

1/18/2023
Date

EXHIBIT F – CERTIFICATION OF INSURANCE REQUIREMENTS

All Subrecipients shall at all times maintain insurance in the coverage limits noted below at Applicant's expense.

Preferred limits below may be adjusted on a case by case basis.

Workers' Compensation insurance in compliance with ORS 656.017, which requires subject employers to provide workers' compensation coverage in accordance with ORS Chapter 656 or CCB (Construction Contractors Board) for all subject workers. Contractor and all subcontractors of Contractor with one or more employees must have this insurance unless exempt under ORS 656.027. **Employer's Liability Insurance with coverage limits of not less than \$1,000,000 must be included. If Contractor does not have coverage, and claims to be exempt, Contractor must indicate exemption below with qualified reasons for exemption, ORS 656.027.** Out-of-state Contractors with one or more employees working in Oregon in relation to this Contract must have Workers' Compensation coverage from a state with extraterritorial reciprocity, or they must obtain Oregon specific Workers' Compensation coverage ORS 656.126. ☐ Check this box if Contractor is exempt and provide qualified reason: _____

Professional Liability insurance covering any damages caused by error, omission or any negligent acts of the Contractor, its subcontractors, agents, officers, or employees' performance under this Contract. **Combined single limit per occurrence shall not be less than \$2,000,000. Annual aggregate limit shall not be less than \$2,000,000.** If coverage is on a claims-made basis, then either an extended reporting period of not less than 24 months shall be included in the Professional Liability insurance coverage, or Contractor shall provide **Tail Coverage.**

- ☐ If this box is checked, the limits shall be \$1,000,000 per occurrence and \$1,000,000 in annual aggregate.
☐ Required by City ☒ Not Required by City (Needs Finance Insurance Review and Approval.)

Commercial General Liability insurance with coverage satisfactory to the City on an occurrence basis. **Combined single limit shall not be less than \$2,000,000 per occurrence for Bodily Injury and Property Damage and annual aggregate limit for each shall not be less than \$3,000,000.** Coverage may be written in combination with Automobile Liability Insurance (with separate limits). **Annual aggregate must be on a "per project basis".** A combination of primary and **Excess/Umbrella insurance** may be used to meet the required limits of insurance.

- ☐ If this box is checked, the limits shall be \$1,000,000 per occurrence and \$2,000,000 in annual aggregate.
☐ If this box is checked, the limits shall be \$5,000,000 per occurrence and \$5,000,000 in annual aggregate.
☒ Required by City ☐ Not Required by City (Needs Finance Insurance Review and Approval.)

Automobile Liability covering all owned, non-owned, or hired vehicles. This coverage may be written in combination with the Commercial General Liability insurance (with separate limits). **Combined single limit per occurrence shall not be less than \$2,000,000.** Use of personal automobile liability insurance coverage may be acceptable if evidence that the policy includes a business use endorsement is provided.

- ☐ If this box is checked, the limits shall be \$1,000,000 per occurrence.
☐ If this box is checked, the limits shall be \$5,000,000 per occurrence.
☒ Required by City ☐ Not Required by City (Needs Finance Insurance Review and Approval.)

Pollution Liability covering Contractor's or appropriate subcontractor's liability for bodily injury, property damage and environmental damage resulting from sudden accidental and gradual pollution and related cleanup costs incurred by Contractor, all arising out of the Goods delivered or Services (including transportation risk) performed under this Contract is required. If this coverage is on a claims-made basis, the policy must provide a 24-month extended reporting period. **Coverage must have a limit of not less than \$2,000,000 per incident/claim and \$2,000,000 policy annual aggregate.**

- ☐ Required by City ☒ Not Required by City (Needs Finance Insurance Review and Approval.)

Sexual Abuse and Molestation for the duration of the contract and for the period of time in which Contractor is providing business services. **Coverage must include limits of not less than \$1,000,000.**

☐ Required by City ☒ Not Required by City (Needs Finance Insurance Review and Approval.)

Coverage must be provided by an insurance company authorized to do business in Oregon or rated by A.M. Best's Insurance Rating of no less than A-VII or City approval. Contractor's coverage will be primary in the event of loss and state the deductible or retention level. Contractor shall provide a current Certificate of Insurance and renewal upon expiration of any of the required coverages. Contractor shall immediately notify the City of any change in insurance coverages.

Additional Insured - the City must be listed as an Additional Insured by endorsement for any General Liability policy on a primary and non-contributory basis. Such coverage will specifically include products and completed operations coverage.

Description of Operations shall state: "Project Name: The City of Albany, its officers, employees and agents are additional insureds with respect to Contractor's activities to be performed under this Contract. Coverage shall be primary and non-contributory with any other insurance and self-insurance, (include the number). This form is subject to policy terms, conditions and exclusions."

A copy of the endorsement shall be attached to the Certificate of Liability Insurance. Contractor shall provide complete copies of insurance policies if requested by the City.

Certificate holder shall be listed as: City of Albany, P.O. Box 490, Albany, OR 97321. Certificates of Insurance may be emailed to City of Albany, Finance Dept., Diane Murzynski, at insurance@cityofalbany.net.

Signature Block:

Applicant's Acceptance: Lynnette W. Kopp

Date: 4/18/2023

Company Name: Brown & Brown NW



Request for Applications (RFA): Community Development Block Grant Activities

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333 Broadalbin Street SW, Albany, Oregon 97321-0144 | BUILDING 541-917-7553 | PLANNING 541-917-7550

Exhibit G: RELIGIOUS/FAITH-BASED ORGANIZATION CERTIFICATION

If the agency is or represents that it is, or may be deemed to be, a religious or denominational institution or organization or an organization operated for religious purposes. The agency agrees that, in connection with such community development activities and operational costs:

1. It will not discriminate against any persons seeking CDBG-funded services and/or related services on the basis of religion or religious belief; and
2. It will not use CDBG funds to support any inherently religious activities, such as worship, religious instruction, or proselytization.

The agency/subrecipient is NOT a religious organization.

Lynnette Wynkoop
Signature

1/19/2023
Date

Lynnette Wynkoop
Printed Name and Title

Family Connectors
Agency Name

The agency/subrecipient IS a religious or faith-based organization and agree to follow terms above.

Signature

Date

Printed Name and Title

Agency Name

Family Connections Advisory Committee Members 2021-2023

Member Name	Contact Info	Organization	County	Language
Autumn Belloni	autumn.belloni@blesd.k12.or.us	Early Intervention Director	Lincoln	English
Chrystee Houser	chouser@kidcoheadstart.org	Kidco Headstart	Linn/Benton	English
Debbie McPheeters	debbie.mcpheeters@blesd.k12.or.us	Early Intervention, Program Coordinator	Linn	English
Patty Shukle	elcdirector@ymcaalbany.org	YMCA Director	Linn	English
Jill Irwin	jill_irwin@oldmillcenter.org	Old Mill Center	Benton	English
Minnie Evans	jordanandminnie@gmail.com	Parent	Benton	English
Kathleen McDonnell	kathleen.mcdonnell@oregonstate.edu	OSU Child Development Center	Benton	English
Kimberly Gross	kimberly.gross@blesd.k12.or.us	Early Intervention, Program Coordinator	Benton	English

Proposed Budget FY 2023-24	
Total Salary	\$ 210,000.00
Total Benefits	\$ 120,000.00
Materials/Supplies	\$ 16,000.00
Supports & Incentives for programs	\$ 12,000.00
Total	\$ 358,000.00

ADMINISTRATIVE RULE NO: 1015-01

RELATED TO POLICY SERIES NO: 1015

TITLE: NONDISCRIMINATION, NONHARASSMENT STATEMENTS & PROCEDURES

PURPOSE

To encourage, create, or maintain a workplace, campus, properties, educational environments, benefits, programs, and activities that are free from harassment, discrimination, retaliation, or other misconduct so students and staff may be fully able to engage in the mission, vision, and values of Linn-Benton Community College. To remain in full compliance with federal, state, or local statutory and regulatory requirements. To demonstrate LBCC's commitment to a timely and impartial means of due process to address any allegation of unlawful or impermissible discrimination and/or harassment.

STATEMENT

Linn-Benton Community College prohibits unlawful harassment as well as any form of unlawful discrimination based on race, ethnicity, religion, national origin, sex or sexual content, gender, marital status, disability, veteran's status, age, sexual orientation, or any other status protected by federal, state or local law, in any activity, benefit, service, program, or operation of the college on any property or at any location under the control of LBCC or its partners at the time.

The college complies with applicable provisions of the Civil Rights Act of 1964 (as amended), related executive orders 11246 and 11375, Title IX of the Education Amendments Act of 1972 (as amended), Section 504 of the Rehabilitation Act of 1973, the Americans with Disabilities Act of 1990 (as amended), Uniformed Services Employment and Reemployment Rights Act (USERRA), the Jeanne Clery Act, the Violence against Women Act of 1994 (VAWA, as later ratified); and all federal, state, and local civil rights or non-discrimination/non-harassment; and non-hazing laws (ORS 339, 339.351, et al).

In addition to enforcing federal law and definitions of gender discrimination and harassment, [LBCC enforces Oregon state law and definitions as published here](#). Processes to address state violations will comply with or exceed the requirements of [HB 3415 as enrolled](#).



EXHIBIT A: APPLICATION

5.1 Applicant Information

Applicant (organization name): Jackson Street Youth Services

Contact Person: Lauren Winchester Email: lauren.winchester@jacksonstreet.org

Mailing Address: PO Box 285, Corvallis, OR 97339

Phone #: 541-286-4580 Agency website: www.jacksonstreet.org

UEI #: WEZURT7AMM89 EIN: 93-1269503

Organization Mission Statement:

Jackson Street Youth Services is here to promote safety, stability and well-being for youth. We work to prevent homelessness by showing a path to long-term success through building positive relationships and teaching skills for self-sufficiency.

5.2 Proposal Summary

Activity/Program Name: Albany House 24/7 Youth Shelter

Activity Location: Albany, Oregon

Proposal Summary: *Provide a summary of the proposed activity and anticipated outcomes.*

We are requesting funds to support Jackson Street's Albany House emergency and transitional shelter for vulnerable youth, ages 10 to 17, who are homeless or at risk of homelessness. Licensed by the Oregon Department of Human Services, Albany House operates 24 hours a day, seven days a week, 365 days a year, and has served more than 350 youth since it opened in 2015.

Albany House reopened in the summer of 2022 after significant renovations that allow the program to continue to provide safe, stable housing for youth experiencing or at-risk of homelessness in Albany. Youth and staff are delighted with the new space, which better facilitates supervision and flow as youth study, cook and eat, and learn skills for self-sufficiency together. In the wake of COVID, we have seen an increase in family conflict resulting in abuse and neglect, and Albany House provides a safe space with caring adults for youth to build skills and healthy relationships and ultimately find their way forward.

ACTIVITY BUDGET FOR WHICH CDBG FUNDS ARE BEING REQUESTED:

CDBG Funding Request	\$	30,000
Leveraged Funds/Resources	\$	720,000
Total Activity Budget	\$	750,000



5.3 CDBG Application Narrative

Provide the information requested below **in a separate document** making sure the narrative corresponds to the numbers provided so the required information can be easily found to ensure a complete application. If the question does not apply to the proposed project write N/A.

Activity Description

1. Explain which priorities in Albany's 2023-2027 Consolidated Plan will be addressed by the activity.
2. Describe the community need that will be addressed by the proposed activity.
3. Explain how the activity is an effective strategy to address the identified gap in needs. Provide statistics or evidence to document the activity need.
4. Please specify which CDBG National Objective(s) will be satisfied by the proposed activity.
5. Explain how the project will promote inclusiveness and diversity. Include your agency's nondiscrimination policy for employees and clients as an attachment.
6. For faith-based organizations, explain how your agency will ensure CDBG funded activities are separate from explicitly religious activities such as worship, study of religious text, or evangelizing.

Benefit to low-income Albany residents

7. Who and how many will benefit from activity (estimate # of people, describe clients)?
8. Of these, how many are estimated to be extremely low-income (earning <30% of area median)? Is there any special emphasis on serving extremely low-income residents?

Scope of Work

9. Provide a **DRAFT SCOPE OF WORK** that outlines details about the proposed activity including all actions that will be taken to address the identified need and achieve anticipated performance measures and outcomes, and general accomplishments you intend to achieve with this activity.

Project Feasibility – Readiness to proceed

10. Please describe your readiness to proceed, whether land use or other issues are resolved and whether your organization has the administrative capacity to complete the proposed project. Describe the current organizational capacity to complete and manage the activity within the program year.
11. Please complete the schedule that follows or provide one that is applicable to the activity/project that outlines when major activities will be executed and when the project will be completed.

Organizational Capacity and Activity Sustainability

12. Describe experience and success conducting similar projects, use of federal or CDBG funds.
13. If any issues were raised during a federal program monitoring evaluation, please explain the findings and how issues were resolved.
14. Explain agency experience managing construction projects subject to Davis-Bacon and/or BOLI wage requirements and/or soliciting bids for construction projects.
15. Identify any other agencies or partners for this activity/project and define the roles and responsibilities of these partners.
16. Please explain how the agency embraces and demonstrates diversity within the organization.
17. If not fully funded, will the agency be able to pursue the activity/service (possibly at a reduced scale)?

Financial



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18. Why are CDBG funds the best fit/source? Are there other sources of funding for this activity?

5.4 Proposed Activity Budget

Provide the activity budget describing total cost, cost per task, existing (secured) project funds and unfunded costs. (DO NOT PROVIDE THE FULL AGENCY BUDGET HERE JUST THE ACTIVITY BUDGET.) Identify any and all source(s) of funding. This would include other Federal and State grants and loans, monetary donations, in-kind contributions, volunteer labor, donation of materials and supplies, etc. Use the template provided below or your own as long as the same information is provided.

Activity/Project Budget Summary (See 24 CFR 570 Subpart J)			
Estimated Total Cost of Activity:	\$750,000		
CDBG Funding Requested for Activity:	\$30,000		
Total Number of People/Households Served:	100		
Total Cost per Person/Household:	\$7500		
Total CDBG Cost per Person/Unit	\$3000		
Describe Source of Other Funds:	Amount	Amount Secured	Amount Tentative
Federal:	125,000	120,000	5,000
State:	370,000	70,000	300,000
Local:	15000	15,000	0
Donations/Private:	210,000	0	210,000
Grants:			
Loans:			
Activity Budget Detail (Non-Development Activities)			
Specific Cost Item/Description	CDBG Amount Requested	Other Funds Amount	Total Amount CDBG + Other Sources
Personnel – Case Managers, Shelter Managers, Facilities Manager, Mental Health Therapist	\$30,000	\$620,000	\$650,000
Facilities Expense – Maintenance, Utilities		\$15,000	\$15,000
Program Food and Supplies		\$10,000	\$10,000
Admin Expenses – Finance, Data Support, HR		\$75,000	\$75,000
Total	\$30,000	\$720,000	\$750,000



5.5 Staff Experience and Qualifications

Identify the names of staff or contractors participating in the proposed program or activity, their role, experience they have in this role, their title, and the expected FTE on the project. **Include in an attachment resumes for key personnel anticipated to work on the proposed program, project, or activity.** Please make sure to identify the person responsible for collecting program performance data and preparing the quarterly reports for the City.

Employee	Experience and Qualifications
Name: N/A Title: Youth Advocates FTE on This Project: about 10.0	Youth Advocates provide direct supervision of youth residing at shelter and/or participating in programs and activities: answer crisis-line and other phone calls; maintain client files. Lead activities such as meal-planning and preparation; work with youth on household chores; supervise outings and recreational activities; supervise 'study hall' and help youth with homework. Informally counsel youth while acting as both advocate and role model. Jackson Street prioritizes hiring employees, either students or recent graduates, with degrees in the social sciences.
Name: Yvonne Russell Title: Shelter Assistant Manager FTE on This Project: 0.5	Yvonne supports the Shelter Manager in managing the two shelters, including guiding day-to-day operations and supervising staff. This position helps with scheduling, compliance, and the health & safety of youth. It also provides guidance for programming, covers Youth Advocate shifts when needed, and connects with youth in the shelters to provide another positive and trusting relationship.
Name: Susan Richey Title: Lead Aftercare Case Manager FTE on This Project: 0.5	Susan is responsible for the follow up case management for youth after they leave shelter services. She works with youth to establish goals and ensuring that they have access to the necessary resources and referrals so that the youth can achieve them. She connects them to activities and groups that Jackson Street offers ensuring that they continue to have access to social-emotional supports after their stays end. Susan has a degree from Portland State and has more than 5 years of experience with Jackson Street.
Name: Salvador Maciel Title: Shelter Manager FTE on This Project: 0.5	Salvador oversees the day-to-day operations of Jackson Street shelter services including the supervision and scheduling of staff. He is in charge of the coordination of case management with youth and families accessing shelter services. Salvador ensures that the shelter is in compliance with state licensing and funders' requirements as well as health & safety regulations. Salvador has more than 8 years of experience with Jackson Street.



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Applications Due by 5:00 p.m. Thursday, January 19, 2023 (PST)

333 Broadalbin Street SW, PO Box 490, Albany, Oregon 97321-0144 | Planning 541-917-7550

<p>Name: KendraSue Phillips-Neal</p> <p>Title: Program Director</p> <p>FTE on This Project: 0.5</p>	<p>Kendra supervises Program Managers, Positive Youth Development Coordinator, Mental Health Therapist, & Data Specialist; develops, implements, and maintains programs to reach designated outcomes; works directly with partner agencies to deliver necessary services for youth and their families. Ensures implementation of staff and volunteer training plans. Works with partners to secure contracts for services. Prepares reports to funders. Leads the Resident and Outreach Coordination Team (ROCT). Works with Board and Administrative staff to formulate strategic goals and define plans for achieving them. Kendra has a degree from OSU and has held almost every direct-service staff position in during her 17-year career at Jackson Street.</p>
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Request for Applications (RFA): Community Development Block Grant Activities

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Activity Description

1. Explain which priorities in Albany's 2023-2027 Consolidated Plan will be addressed by the activity.

PRIORITY 2: *Reduce homelessness.* We work with youth to help them exit to safe, stable housing. When possible, our goal is to reunite youth with their families. However, if this is not in the youth's best interest, we enroll youth in our Transitional program, where we help them prepare to live successfully on their own. Our services provide a protective barrier to end homeless at a young age and prevent it from developing into chronic adult homelessness.

PRIORITY 3: *Increase availability of needed services for low- and moderate-income residents.* We provide services to vulnerable youth who are homeless, at risk of becoming homeless or experiencing a serious family crisis. These youth usually have very low or no income and rely solely on Jackson Street to meet their needs for shelter, food, and guidance. In addition to the services we provide at our shelter, we connect youth to a wider array of community services that can continue to support their well-being after they leave the shelter.

PRIORITY 4: *Expand economic opportunities for low- and moderate-income residents.* Education is a core focus at Jackson Street, and we place a strong emphasis on supporting each youth's advancement to a diploma or GED, giving them a foundation for future employment and self-sufficiency. Our shelter schedule includes daily study hall sessions with access to academic coaches; staff act as advocates/liaisons to keep youth connected to school or alternative education. We also work with partners such as the Community Services Consortium to provide internships and job-readiness coaching for older youth; and we help them acquire the documents necessary for entering the workforce (birth certificates, state ID cards, food handlers certificates, etc.)

2. Describe the community need that will be addressed by the proposed activity.

Without intervention, these vulnerable youth have greatly-increased risks of failing to graduate from high school, abusing drugs/alcohol, trading sex for a place to sleep, and being trafficked. Youth homelessness also increases the likelihood of attempted suicide, gang involvement, and criminal activities, and chronic adult homelessness.

However, vulnerable youth are at a tipping point when positive action can change their life trajectory from a downward spiral into chronic poverty and dependency to an upward trend toward self-sufficiency and long-term well-being. This not only benefits the youth but also society – millions of tax dollars are spent each year on youth in the juvenile justice system, incarceration, emergency room care, etc. Jackson Street is equipped with the tools and knowledge to redirect vulnerable youth from a future of poverty and chronic homelessness, and instead help them improve safety and well-being, make positive connections to adults in the community, learn life skills, and improve their employment prospects

3. Explain how the activity is an effective strategy to address the identified gap in needs. Provide statistics or evidence to document the activity need.

According to the Greater Albany Public School District in conjunction with the Oregon Department of Education, 277 youth were reported as homeless during the 2019-20 school year, and 83 Albany youth were listed as unaccompanied, meaning they were runaway, abandoned, or unsupervised.

Although the annual school count is helpful in gauging the size of the problem, it is by no means comprehensive, because it only considers youth who are still enrolled in school. Many homeless youth are disconnected from school and not included in this survey, so the true size of the population is difficult to estimate. Unlike in major metro areas, our youth are not always visible and present on the street but can be hidden, "couch-surfing" with friends or extended family.



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It's a common misconception that big-city, urban youth experience homelessness more frequently than youth from smaller towns or rural areas, when in fact rates of youth homelessness are similar regardless of community size. National statistics state that 1 in 30 adolescent minors (ages 13 to 17) and 1 in 10 young adults (ages 18 to 25) endure some form of homelessness each year, and communities in Oregon are no exception.

At Jackson Street, we are dedicated to employing proven best-practices to help each youth find a path to enduring future success. Albany House is a crucial component of this change, where youth are given a safe space to have their needs met and continue developing physically, emotionally, psychologically, and socially.

4. Please specify which CDBG National Objective(s) will be satisfied by the proposed activity.

Benefit low/moderate-income individuals or households. Our shelter exclusively serves vulnerable youth ages 10-17, nearly all of whom have very low to moderate family income – or no income at all for those who are unaccompanied. These youth rely on Jackson Street's comprehensive range of services, offered at no charge. All services are 100% youth-focused and exist to improve youths' lives in the present and help guide them to a successful future.

5. Explain how the project will promote inclusiveness and diversity. Include your agency's nondiscrimination policy for employees and clients as an attachment.

In all interactions with youth, staff model attitudes of kindness, respect, acceptance, and openness to people of all backgrounds and cultures. We strive always to support each youth's right to develop and flourish in their own unique identity, and shelter provides them with a safe space to do so. Jackson Street employs staff who are bi-lingual and bi-cultural, have lived experience with homelessness, and/or identify as people of color or LGBTQ+. Having staff members who "walk the walk" supports youth as they learn about and grow into their own identities.

We require Cultural Competency training for all staff, and our work with homeless youth incorporates the use of Trauma-Informed Care (TIC) practices to maximize sensitivity to past abuse, neglect, and injury. TIC practices include awareness and sensitivity to racism and discrimination based on appearance, cultural differences, gender identity, and LGBTQ status. We offer specific mental health and support-group services geared to the needs of youth who have been discriminated against, bullied, abandoned, or excluded. On-going training on TIC and racial/cultural awareness strengthens the ability of staff members to be supportive and responsive to youth who have experienced racial inequality. Just as importantly, the staff is able to raise awareness of and sensitivity to these issues for all of the youth we serve, so the next generation of Oregonians will be more open to inclusiveness and diversity.

6. For faith-based organizations, explain how your agency will ensure CDBG funded activities are separate from explicitly religious activities such as worship, study of religious text, or evangelizing.

N/A

Benefit to low-income Albany residents

7. Who and how many will benefit from activity (estimate # of people, describe clients)?

Albany House will serve 80 – 110 youth who are homeless or at risk of homelessness and ages 10 – 17. 80% are estimated to be low income.

8. Of these, how many are estimated to be extremely low-income (earning <30% of area median)? Is there any special emphasis on serving extremely low-income residents?



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Youth often but not always come from low-income families. Youth who are homeless usually have no income when they first access our services. Our last reporting showed 90% of the youth were in the extremely low-income category. COVID-19 has exacerbated the issue of income.

Scope of Work

9. Provide a **DRAFT SCOPE OF WORK** that outlines details about the proposed activity including all actions that will be taken to address the identified need and achieve anticipated performance measures and outcomes, and general accomplishments you intend to achieve with this activity.

Our continuum of services is designed to intervene and prevent homelessness. Street and School Outreach builds trust with youth and the community and brings needed resources and referrals to where the youth are. Homeless youth or youth at risk of homeless and referred by school counselors may find out about (emergency) shelter through this outreach. When family reunification is not safe or possible, minors may stay longer at the (transitional) shelter. For youth ages 18–24 we have our Next Steps program. Our Albany House youth shelter is at the center of these services and provides more than just a safe place to be.

We strive to meet the needs of all youth in our shelter and to do so using evidence-based best practices, working toward four core outcomes for youth:

- Safe and stable housing;
- Physical, mental, social & emotional well-being;
- Permanent connections to caring adults and to the community; and
- Educational achievement & employment readiness.

Safety & Stability: Albany House provides this in the form of Emergency Shelter and Transitional Shelter while working toward finding safe, secure housing for each youth for the longer term.

Emergency Shelter stays range from a few hours up to 21 days. They include a safe, stable environment with 24-hour supervision by qualified, caring adults, healthy meals, hygiene products, clothing/shoes, skills-coaching, access to medical care and other services, individual case management, and a plan to reunite the youth with the family (if appropriate). Employees (Youth Advocates) who staff the shelter 24/7 are trained in Trauma-informed care, suicide prevention, mental health first aid, collaborative problem solving, and cultural sensitivity. Stability is further implemented through a dependable, home-like schedule: youth have specific times to wake up and get ready for the day, complete homework, enjoy free time, cook and eat meals together, and engage in other educational and social activities. Youth are also provided with family mediation and referrals for counseling or medical care, as needed. The ultimate goal is to reunite them with their family or find safe, stable alternative housing.

Transitional Shelter is our program for youth whose circumstances require a stay of more than 21 days. It encompasses all of the services listed for Emergency Shelter but adds intensive case management with the goal of preparing youth for independence and self-sufficiency. Youth work one-on-one with a Case Manager to develop a plan that addresses both immediate and longer-term needs, and to set goals that will lead to a safe and stable future.

Well-Being: Our program addresses physical, mental, emotional, and social well-being.

Physical & Mental: All youth entering shelter have access to medical, dental, and mental health services and staff members can help youth enroll in the Oregon Health Plan if they don't have insurance. Because



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there can be a long wait for community mental health services, we have an in-house Mental Health Therapist who can assist youth in crisis situations, help arrange longer-term care if needed, and provide interim counseling until longer-term solutions are available.

Social & Emotional: Positive Youth Development (PYD) is a critical component of our services that weaves through all we do with youth. An important aspect of applying PYD in our program is creating ongoing and intentional opportunities for youth to feel empowered in making decisions about their lives. As youth engage in the case management process, they are active in developing their individual goals and service plan. Youth are also involved in decisions that affect their day-to-day living through weekly house meetings at the shelter and daily tasks like helping plan and cook meals. We also offer service-learning opportunities, which can have the added benefit of strengthening youths' connection to their communities.

Facilitated peer-support groups are another tool we use to help youth develop social skills. These include Girls' Circle and Boys' Council groups in local schools, PS 541 skill-building sessions for older youth, and weekly meetings for LGBTQ youth. (Thanks to COVID, we now have experience with virtual and hybrid session options in addition to in-person meetings.) We use evidence-based approaches including Non-Violent Crisis Intervention and Life Space Crisis Intervention (LSCI) to help safely manage disruptive and potentially dangerous behavior, using clear communication to model positive coping methods. LSCI is a trust-building method between adults and youth, to guide them toward overcoming defeating patterns and making better choices.

Permanent Connections: Positive Youth Development (PYD) is a key component in the process of helping youth develop permanent connections that will promote personal growth and stability. It emphasizes building positive relationships, a sense of belonging, and opportunities to empathize with others. This is modeled by Youth Advocates and Case Managers as they build rapport with youth and demonstrate what a healthy relationship looks like. When youth leave the shelter, they have access to our Aftercare Services Case Manager for ongoing support and are invited to continue participating in shelter activities. We focus on helping youth develop permanent connections to non-staff members. This could be through families, schools, or other community members that provide a positive, supportive social network. (Jackson Street sponsors a Mentoring program to match youth with supportive adults who are screened and coached by our staff.) Community partnerships are particularly useful for this aspect of our work, providing family mediation and volunteer or internship opportunities. Our goal is for our youth to develop lasting positive connections to responsible, caring adults within our community.

Education & Employment: Jackson Street has always stressed the importance of education as a foundation for success in adult life. Staff assists youth to engage in school or to find alternative means to advance their studies. Ideally, youth remain in their schools of origin, but we can also help youth to enroll in online programs or pursue a GED independently or through Linn-Benton Community College. A mandatory "study hall" session occurs Sunday through Thursday while school is in session. If youth don't have schoolwork to do, they must choose another educational project to work on from subject-matter binders available at each shelter. Staff and volunteers are available to help with homework or study skills, and more intensive academic coaching can be arranged as needed.

The Community Services Consortium is a valuable partner in helping youth prepare for employment. Staff, volunteers, peer-support groups, and partners like CSC assist with: developing a resume; career placement assessment; job interviewing skills; internships, and on-the-job training. A primary goal is to help youth learn vital skills for job readiness such as accountability, critical thinking, and how to successfully work with co-workers to complete tasks. We pride ourselves on helping youth to advance their education and/or career plans while in our services.



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EXPECTED OUTCOMES:

- *Safety & Stability – 80% of youth will exit the shelter safely. (Where appropriate, we promote family reunification. If that is not feasible or isn't safe, we work with youth to find a safe alternative.)*
- *Well-Being – 90% of youth will receive services and/or engage in activities to promote physical, social, and emotional well-being.*
- *Permanent Connections – 90% of youth will exit shelter with positive permanent connections to 2 or more caring adults; and 90% of youth will exit with connections to the community.*
- *Education/Employment Assistance for Self-sufficiency – 80% of youth in our services will advance their education. (All youth staying in the shelter for more than 72 hours must be enrolled in school or engaged in alternative education or job training.)*

Project Feasibility – Readiness to proceed

10. Please describe your readiness to proceed, whether land use or other issues are resolved and whether your organization has the administrative capacity to complete the proposed project. Describe the current organizational capacity to complete and manage the activity within the program year.

The shelter has been functioning at or near full capacity 24/7 since it opened in 2015. After leasing our Albany House property for nearly 5 years, the agency purchased it in 2019 and completed an expansion in July 2022. The new space is wonderful and meets programmatic and youth needs well.

We continue to hire and work on increasing staff retention measures for our current staff. Hiring has picked up, and we are working to fully staff Albany House and hire Youth Advocates in time to re-open Corvallis House later this winter.

Program Managers and critical program support staff have stayed fairly constant, and coupled with many years of experience training staff to work with youth, we are confident that we can prepare new staff to deliver top-notch care to youth.

11. Please complete the schedule that follows or provide one that is applicable to the activity/project that outlines when major activities will be executed and when the project will be completed.

Albany House accepts youth any time they need Jackson Street's services. Within 72 hours of intake, youth participate in an intake process that includes screening for risk factors like a history of being trafficked and completing a Casey Life Skills Assessment. Youth meet with their case manager to address basic needs (school enrollment, medical needs, food, shelter, hygiene items, clothes, important documents like IDs and birth certificates) and long-term plans and needs. Youth work with their case manager to plan for safe reunification with family, a transition to independent living, or a move to other safe, stable housing alternatives.

Once settled in the program, youth participate in activities structured around the concept of Positive Youth Development that focus on connection, confidence, competence, character, and contribution.

Key activities for youth during the year include:

- July/August - Summer Enrichment Activities include outdoor recreation like a hike in Suislaw Forest and educational activities like a trip to OMSI
- September to June – Education Assist includes help with enrolling and nightly "study hall"



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- November – National Runaway Prevention Month includes outreach at the Albany Skate Park and a vigil for youth homelessness
- Nov/Dec – Holiday activities, food box distribution, and wish list items provided by the community.
- June – Senior graduation celebration

Organizational Capacity and Activity Sustainability

12. Describe experience and success conducting similar projects, use of federal or CDBG funds.

Jackson Street has been effectively offering services to vulnerable youth for nearly two decades. Jackson Street's two overnight shelters for minors are licensed by the Oregon Department of Health and Human Services (DHS) since they opened (Corvallis House in 2001 and Albany House in 2015). State licensing is renewed every two years and requires comprehensive inspections of facilities and records as part of each renewal.

Since 2011, Jackson Street has been awarded a series of highly-competitive multi-year federal grants by the Family and Youth Services Bureau (part of HHS): Basic Center Grants in 2011, 2014, 2017, and 2020 for the operation of our overnight shelters; Street Outreach grants in 2014 and 2019; and a 5-year Transitional Living Program grant in 2017. Organizations receiving these grants must adhere to stringent federal requirements that promote best practices and evidence-based approaches for working with runaway and homeless youth and those at risk of becoming homeless. Recent state licensing and federal grantor site visits have commended us on the quality of our programs, community support, long-term leadership, and positive youth interviews.

Collectively, our Executive Director, Operations Director, and Program Director have more than 40 years of experience with runaway and homeless youth and have stewarded the agency's growth from a small, single-purpose, grass-roots organization to a highly-professional agency offering a continuum of services for youth and young adults. We have an active Board providing oversight and annual professional audits by an independent CPA firm.

13. If any issues were raised during a federal program monitoring evaluation, please explain the findings and how issues were resolved.

No issues.

14. Explain agency experience managing construction projects subject to Davis-Bacon and/or BOLI wage requirements and/or soliciting bids for construction projects.

N/A

15. Identify any other agencies or partners for this activity/project and define the roles and responsibilities of these partners.

Ending youth homelessness in our region is a vast undertaking, so we greatly value the benefits of community partnerships and interact heavily with local organizations in order to avoid the duplication of services, collaborate on "wrap-around" services, and leverage scarce resources.

Key partnerships for Albany House include:

- Linn County Juvenile and Health Departments: They make referrals to us, and we coordinate with probation officers and other staff during case planning.
- Greater Albany Public Schools: Staff maintains close communication to monitor our youths' engagement in school and make sure they stay on top of homework and studies. We work



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particularly closely with their McKinney-Vento Homeless Liaison, FACT (Family and Community Together), and Albany Options alternative school.

- Linn Benton FoodShare: Provides low-cost food items and supplies for Albany House.

Other partnerships that help our shelter run optimally include the Community Services Consortium, the Linn County office of Department of Human Services, Linn-Benton-Lincoln ESD, and many more. These partners send us referrals, collaborate with us to create ideal case plans for individual youth, and allow us to refer youth for specific services such as medical care, therapy, or family mediation. We leverage each valued partnership: we know we cannot do this alone, and we don't try to.

16. Please explain how the agency embraces and demonstrates diversity within the organization.

Diversity is one of our eight core organization values: "We strive to be knowledgeable and open-minded in order to provide an open and non-judgmental place for all." This inclusive mindset is prevalent throughout our services, and significantly impacts the way our shelters operate. Our staff is relatively diverse, including individuals who are white, Latino/a, African American, Asian, mixed-race, part of the LGBTQ community, and those from a background of poverty and/or family dysfunction.

We have several employees who speak Spanish, including our Shelter Manager, Salvador Maciel. Salvador and other bilingual staff are not merely used as translators, but also engage the youth in casual conversation in their first language throughout the day to make these youth feel more at ease and build trust. Youth also help choose what food we eat at the shelter, incorporating ethnic recipes and dishes of their choice. We encourage youth to celebrate holidays and traditions that are important to them.

Jackson Street has always served a population of youth that is more diverse than the general demographics for the mid-Willamette Valley region. Youth who are black, Latino/a, Native American, or Pacific Islander experience significantly higher rates of homelessness. Family poverty greatly increases the risk of homelessness, and national estimates suggest that at least 30% of runaway and homeless youth identify as LGBTQ. Albany House readily accommodates youth of all gender identities and attractions.

17. If not fully funded, will the agency be able to pursue the activity/service (possibly at a reduced scale)?

The funding for the Albany House is a blend of federal, state, local government grants, private foundations, and community donations. Since staffing ratios are required for supervision of minors, we can only scale back to our current 10 beds (anything less would compromise those requirements and safety of the youth) instead of expanding our staffing capacity to cover more than 10 youth at a time.

Financial

18. Why are CDBG funds the best fit/source? Are there other sources of funding for this activity?

CDBG funds fit our Albany House 24/7 youth shelter project because it addresses the needs of low to moderate-income residents, provide housing, behavioral and mental health support, and education and employment skills for long-term success. Albany House provides a safe, stable environment with 24-hour structured supervision by qualified, caring adults, healthy meals and snacks, personal hygiene products, clothing and shoes, skills coaching, access to medical care and other essential services, individual case management, and a plan to either reunite youth with their families (if appropriate) or find them other safe housing. After they leave the shelter, we offer continued support and assistance including services such as family mediation. Staffing a shelter 24/7, 365 days a year needs funding from many sources.

Yvonne Russell
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Monmouth, OR 97361

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ydeedominguez@gmail.com

Education

Bachelor of Science Degree, Human Development and Family Science
Oregon State University, Corvallis OR

Graduated Spring 2019

Associate of Applied Science Degree, Human Services/Social Services
Chemeketa Community College, Salem OR

Graduated Summer 2015

Experience

Shelter Assistant Manager

February 2022-Present

- Provide direct training and support to staff, volunteers and interns
- Assisting with performance evaluations
- Support shelter manager with day to day tasks such as case reviews,
- Family meetings, supplies orders, case planning and on call duties
- Grant and contract reporting
- Providing onsite support with youth and staff
- Working with shelter manager in creating shelter procedures
- Leading shelter staff meetings and case managers meeting
- Facilitating resident house meetings for the youth
- Perform weekly COVID testing.

Lead DHS Case Manager

April 2021-February 2022

- Coordinated with Shelter Manager and worked collaboratively in case planning
- Worked with DHS caseworkers and other service providers in problem solving on how to meet each youth's needs
- Provided behavior reports to DHS caseworkers and other service providers
- Provided 24-hour weekend on-call in the overnight shelter and assisted in crisis interventions and collaborative problem-solving
- Coached staff through de-escalating youth and how to work with youth who have challenging behaviors
- Trained Youth Advocates through the day-to-day operations of shelter
- Coached Youth Advocates through policies and procedures
- Developed positive and trusting relationships with youth while in shelter services and in aftercare services
- Assisted in making sure incident reports were documented accurately and submitted to the appropriate providers

Next Steps Skills Coach

March 2020-April 2021

- Coordinated and implemented Peer Support group
- Assisted youth in transitioning to independence to be successful on their own by providing multiply weekly skills sessions
- Completed assessments such as Ansell Casey Life Skills Assessment to determine and develop a service plan based on the needs within the assessment
- Provided life skills coaching and skill building
- Assisted with identifying and implementation of goals with other staff
- Helped youth access resources within the community

- Conducted mediation and crisis interventions as needed
- Provided 24 hour crisis interventions (on-call) on scheduled weekends
- Assisted in property checks
- Completed and thoroughly documented each skills session and services provided

Youth Advocate, Jackson Street Youth Services, Corvallis OR

May 2018 – March 2020

- Helped youth build life skills that lead to independence
- Helped youth with learn healthy communication skills
- Worked with youth on coming up with safety plans
- Worked with youth oh how to deal with their anger
- Helped deescalate youth
- Helped youth problem solve challenging situations
- Encouraged youth to advocate for themselves
- Communicated with service providers and collaborate to help meet youth's needs
- Constant communication with my supervisor
- Documented progress notes on interaction and conversations with youth, service providers and families
- Performed youth intakes and exits
- Supported in setting up schooling and school transportation
- Worked with youth on completing goals that helped them learn to become more independent

Intern, Jackson Street Youth Services, Corvallis OR

Apr. 2018 - Jun. 2018

- Helped youth build life skills that lead to independence
- Helped youth with learn healthy communication skills
- Worked with youth on coming up with safety plans
- Worked with youth oh how to deal with their anger
- Helped deescalate youth
- Helped youth problem solve challenging situations
- Encouraged youth to advocate for themselves
- Communicated with service providers and collaborate to help meet youth's needs
- Constant communication with my supervisor
- Documented progress notes on interaction and conversations with youth, service providers and families
- Performed youth intakes and exits
- Supported in setting up schooling and school transportation

Community Guardianship Coordinator, Catholic Community Services, Salem OR

Nov. 2015 – Dec. 2016

- Collaborated with Community Guardianship (CG) core team and other staff to ensure that the maximum number of youth participate in CG and to strategize on recruiting new advocates
- Interventions and resolution to challenges that developed within the youth and advocate relationship
- Monitored the relationship to ensure the youth is being supported by the advocate
- Trained new advocates and provided monthly trainings to current advocates
- Documented the progress of the youth and advocates' relationship by writing case notes
- Guided foster parents through emergency situations with youth that would arise in their homes after office hours

Intern, Father Taaffe and Community Guardianship, Catholic Community Services, Salem OR

Mar. 2015 – Aug. 2015

- Mentored pregnant teens

- Created a resource binder to help prepare young pregnant women transition out of the Father Taaffe home and into the community
- Created a guide to resources in the community for the Father Taaffe staff and for the young women in the Father Taaffe home
- Documented interactions with the teen mothers

Intern, Safe Families for Children/Fostering Hope, Catholic Community Services, Salem OR Jan. 2015 – Aug. 2015

- Performed office duties such as answering the phone and providing information for the clients' needs
- Screened clients and refer them to resources in the community
- Assisted in screening host families

Intern, Habitat for Humanity, Salem OR

Jan. 2014- June 2014

- Filed, organized, and entered clients' names and information into a database
- Participated and contributed to the Family Selection Committee and helped vet potential Habitat homeowners
- Collaborated on building and organizing of Habitat Teams which is a program dedicated to college students

Leadership

Human Services Advisory Committee, Salem Oregon
Student Representative

Oct. 2013 – Jun. 2015

Volunteer Experience

Volunteer, Community Guardianship, Catholic Community Services, Salem OR

Aug. 2015 – Nov. 2015

- Monitor advocates' relationship with youth who are in foster care
- Documented the interactions between the advocates and youth
- Provided support to the advocates during challenging times throughout the relationship with their youth

Softball Head Coach & Volunteer, Central Youth Sports, Independence OR

Apr. 2017 - Jul. 2019

- Assessed and evaluated each player from 8U through 14U
- Organized, instructed and trained softball players
- Created and taught necessary exercises and drills to players
- Created practice schedules
- Umpired
- Field Maintenance
- Recruited volunteers
- Evaluated the strengths of each player to determine their positions

Skills

- Motivational interview skills
- Active listening skills
- Communication skills
- Interpersonal Skills
- Problem Solving Skills

Trainings and Certifications

- Computer: Microsoft Office Software including Excel, PowerPoint, Word
- Communication: Motivational interviewing

- Harassment Prevention
- Sanctuary Model
- Positive Behavior Supports
- Collaborative Problem Solving Intensive
- Darkness to Light: Stewards of Children
- Youth Mental Health First Aid
- Trauma informed Care
- Anger Reduction Group
- Once Circle Facilitator
- Suicide Prevention
- Mandatory Abuse Reporting
- First Aid and CPR Certified
- Food Handlers
- Mentoring Youth in the Transition from Foster Care to Adult Life
- Trauma Informed Care: Self-Care and Resiliency
- Communication Through Conflict
- Mentoring and Supporting Young People's Mental Health and Wellbeing
- Civil Rights
- Food Safety

Susan Richey

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Albany, Oregon 97322
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richeysusan173@gmail.com

EXPERIENCE

Jackson Street Youth Services, Albany/Corvallis OR — *Lead Aftercare Case Manager*

July 2020 – Present

Implement structure and routine in a case management setting, work with youth one on one to implement life skills. Connect with community partners to establish permanent ties.

Jackson Street Youth Services, Albany/Corvallis OR — *Youth Advocate*

June 2017 – July 2020

Implement structure and routine in emergency shelter, teach life skills, be a part of a team for 24/7 care, communicate with my coworkers and supervisor, and ensure the safety of youth on site.

Sharis Restaurant, Lebanon OR — *Supervisor*

August 2016 - June 2017

Overseen restaurant operations to ensure the restaurant ran smoothly, resolve customer complaints, ensure compliance with food and safety regulations.

EDUCATION

Portland State University, Portland OR — *Bachelor of Science*

September 2016 - June 2018

Graduated with a Bachelors in Criminology and Criminal Justice.

Linn Benton Community College, Albany OR — *Associate of Applied Science*

September 2014 - June 2016

Graduated with an Associate of Applied Science in Criminology and Criminal Justice with a minor in Juvenile Corrections.

SKILLS

Communication with team members.

Critical thinking.

Decision Making.

Teamwork oriented.

Adaptability.

AWARDS

**Basic First Aid and CPR. -
8/30/2019-8/30/2021**

**Oregon Food Handlers Card. -
05/14/2020-05/14/2023**

**Applied Suicide Intervention
Skills Training Certificate. -
08/10/2017**

**Stewards of Children Training
Certificate. -03/21/2018**

**Life Space Crisis Intervention
Certificate. -11/08/2018**

**Girls Circle Facilitator
Training. - 12/11/2018**

**Trauma Informed Care
Certificate. -05/21/2019**

**Question, Persuade, Refer
(QPR) Suicide Prevention
Training 11/18/2019**

**Communicating through
Conflict 4/20/2020**

**Mandatory Reporting. -
5/18/2020**

Salvador Maciel Manzo

3051 23rd Ave. SE Albany, OR 97322

503-881-1129 maciel1121@yahoo.com

EDUCATION

Linn-Benton Community College: Associates, 2009-2015
Human Services

EXPERIENCE

Jackson Street Youth Services; Albany, OR

Shelter Manager: June 2015 to Present

-supervise and manage up to thirteen employees and three interns, approve intakes and exits, manage individual service plans, maintain facility, data entry, file management, licensing and site visits, coordinates TOPSoccer program

Aftercare Services Case Manager: October 2014 to June 2015

-shift work at overnight emergency shelter, direct supervision of youth in shelter, one year follow up care for youth exiting shelter, case management and goal setting, file management, support group facilitation, TOPSoccer programming, human trafficking coalition work

Outreach Worker: September 2013 to October 2014

-shift work at day time drop-in center, develop and implement activities, street outreach, support group facilitation, crisis intervention, life skills coaching, TOPSoccer programming

North Salem Varsity Head Boys Soccer Coach; Salem, OR

Assistant Coach: 2018 to Present

Assumes responsibility for the entire program which includes:

- Coaching the varsity squad and supervising JV & assistant coaches within the soccer program.
- Giving guidance to the high school junior varsity program.
- Implements district athletic department policies.
- worked directly with student players, role model positive behavior and team building, sport skill building.

TFA-Willamette; Oregon

Coach: January 2017 to Present

-U15 boys, sport skill development and discipline, maintain the safety of all players, role model positive behavior and team building, schedule management

United States Soccer; Oregon

Referee: 2011 to December 2014

-all ages, maintain the safety of all players, game management, crisis intervention

CERTIFICATIONS/CEUs

FoodShare Civil Rights Training 4/5/2016 (2 hours)

Impact of Trauma and Neglect 5/11/2016 (3 hours)

Mandatory Reporting 8/24/2016 (4 hours)
National Runaway Homeless Youth (RHY) Conference 2016
7/15/2016 (24 hours)
Pound of Cure (PYD and TIC best practices in programming)
1/26/2017 (6 hours)
Leadership Series: Transformation Leadership & Leading through Chaos
3/7/2017 (7 Hours)
McKinney Vento Liaison Training 3/10/2017 (6 hours)
Implicit Bias Workshop Series 4/10/2017 (5 Hours)
Linn Benton Food Share: Philomath Civil Rights Training
4/25/2017 (2 hours)
Bridge 13--Bridging LGBTQ Communities 10/11/2017 (3 hours)
The Power of Purpose: Collaborative Mentoring Webinar Series
1/18/2018 (1 hours)
Addressing Mental Health Behaviors: Building Competencies and
Confidence for Working with Complex Children Series 2/27/2018
(8 hours)
Trauma: The What, Why and How We Can Respond 11/30/2018 7
Let's Talk HR Issues! 2/6/2019 (2 hours)
Family Acceptance Project: Supporting LGBTQ Youth 4/5/2019 (8 hours)
Question, Persuade, Refer (QPR) Suicide Prevention Training
11/18/2019 (2 hours)
Communicating through Conflict 4/20/2020 (3 hours)
Mandatory Reporting 5/18/2020 (2 hours)
Trauma Informed Care and PYD: January 2017 (8 hours)
OACP Leadership Series: 2016 (24 hours)
Inclusive Leadership: July 2015 (8 hours)
Dabbing and Emerging Trends of Marijuana Concentrates and E-Devices: April
2015 (4 hours)
Youth Mental Health First Aid: June 2014 (8.5 hours)
Taming the Epidemic of Youthanasia: May 2014 (4 hours)
Homelessness and Poverty: February 2014 (1.5 hours)
Case Management in RHY Programs: December 2013 (2.5 hours)
Darkness to Light: February 2013 (3 hours)
Life Space Crisis Intervention: February 2013 (30 hours)
The Impact of Trauma and Teens: January 2013 (3 hours)
ASIST (Applied Suicide Intervention Skills Training): May 2011 (14 hours)
One Cricle Boys Council Facilitation: May 2014 (18 hours)
Youth Services Team: November 2014 (7 hours)
Child Abuse Reporting: January 2013 (3 hours)
Identify, Protect, And Serve Domestic Minor Sex Trafficking Victims: January
2013 (13 hours)
CPR/First Aid and Oregon Food Handlers: Up To Date

EDUCATION

Oregon State University: Bachelor of Science, graduated January 2006
Human Development and Family Science
Minor: Sociology and Spanish

Umpqua Community College: Associates Degree, graduated January 2002
Early Childhood Education

EXPERIENCE

Jackson Street Youth Services; Linn and Benton County, OR

Program Director: July 2013 to Present

Supervision of site supervisors, program coordinators, and case managers; oversight of Jackson Street sites, programs, and services; oversight of state licensing and federal funding regulations; development, implementation, review, and evaluation of programs and services; statistical analysis and grant reporting; human resources; community meetings; Stewards of Children-Darkness to Light training facilitator

Special Projects:

- *Positive Youth Development Coalition Chair-July 2011 to July 2019 and September 2020 to Present*
- *Linn County Council for Child and Family Integrated Services- July 2019 to July 2020*
- *YHDP 100 Day Challenge Member- December 2017 to March 2018*
- *Portland State University Case Management and Certification training program December 2019 to Present*

Shelter Director: February 2011 to July 2013

Supervision and management of overnight shelter, employees, interns, program volunteers, and outreach programs; development and implementation of shelter and outreach programs; approval and assessment of youth accessing shelter services; grant writing, statistical data, and grant reports; community meetings; site visits and licensing; conduct criminal history checks; hiring and termination of employees and interns; chair of PYD Coalition

Shelter Manager and Outreach Case Manager: December 2008-February 2011

Supervision and management of employees, interns, and volunteers; approval and assessment of youths accessing shelter; coordinator of JSYSI-Mentoring, Youth Education Program, and Education Outreach; case management; small grant writing and reporting; community meetings; site visits and licensing; hiring and termination of employees, interns, and volunteers.

CERTIFICATIONS/CEUs

- Mandatory Reporting: May 2020 (2 hrs)
- Strategies for Supporting Rural Youth: May 2020 (3 hrs)
- Communicating through Conflict: April 2020 (4 hrs)
- Question, Persuade, Refer Suicidal Prevention: November 2019 (3 hrs)
- Addressing Mental Health Behaviors: February 2018 (6 hrs)
- Collaborative Mentoring: January 2018 (4 hrs)
- Bridging LGBTQ Communities: October 2017 (5 hrs)
- Implicit Bias: April 2017 (16 hrs)
- McKinney-Vento Laws and Implementation: March 2017 (8 hrs)
- Transformation Leadership: March 2017 (4 hrs)
- Trauma Informed Care and PYD: January 2017 (8 hrs)
- Homelessness and Poverty: February 2014 (1.5 hrs.)
- Case Management in RHY Programs: December 2013 (2.5 hrs.)
- Effective Supervision: June 2013 (7.5 hrs.)
- Communication Drives Innovation: April 2013 (8 hrs.)
- Darkness to Light: February 2013 (3 hrs.)
- Life Space Crisis Intervention: February 2013 (30 hrs.)
- History, Epidemiology and Abuse of Synthetic Drugs: February 2013 (3 hrs.)
- Children at Promise: March 2012 (3 hrs.)
- The Impact of Trauma and Teens: October 2011 (3 hrs.)
- Environmental Prevention Strategies for Youth Ages 18-25: June 2011 (6 hrs.)
- ASIST (Applied Suicide Intervention Skills Training): May 2011 (14 hrs.)
- Best Practice Mentoring: February 2011 and January 2014 (15 hrs.)
- Girls Circle Facilitation: January 2011 (18 hrs.)
- Positive Youth Development: December 2009 (16 hrs.)

- Youth Services Team: November 2009 (7 hrs.)
- Oregon Prescription Drug Abuse: February 2008 (2 hrs.)
- Child Abuse Reporting: September 2008 (3 hrs.)
- Criminal History Authorized Designee: September 2008 (8 hrs.)
- Drug and Alcohol Treatment: September 2007 (3 hrs.)
- Collaborative Problem Solving: November 2007 (12.5 hrs.)
- Child Temperament, Parenting Styles, and Family Dynamics: September 2006 (10 hrs.)
- Identify, Protect, And Serve Domestic Minor Sex Trafficking Victims: 2003 (13 hrs.)



Kela Lynn – President

3220 Park Terrace SW, Albany, OR 97321

541-974-5693 • kelaslynn@gmail.com

Elected to board: November 2018

Occupation: Social Worker, Corvallis School District

Comments: Kela is a social worker with over twenty years of experience, a wife, and a mom. In all of those areas, she knows the great power of relationships as a change agent for healing. She knows that Jackson Street Youth Services cultivates safe and healthy relationships with youth in so many ways – through mentoring, education, shelter, life skills, food, and opportunities!

Kate Conolly – Vice President

941 NW Kouns Drive, Albany, OR 97321

541-971-9130 • revkat1@mac.com

Elected to board: January 2013, January 2020

Occupation: United Methodist clergy; currently serving as pastor of Albany First United Methodist Church

Comments: Jackson Street is the result of tenacious and caring folks who saw tremendous need in Linn and Benton counties, and visualized a safe and nurturing environment for homeless and at-risk youth. “I feel privileged to join with others in this vital work,” says Kate. “I want to do what I can to support the current work of Jackson Street.”

Rita Hamann – Secretary

2995 Oak Ridge St NW, Albany OR

97321 503-338-9148 • ritahamann@gmail.com

Elected to board: August 2011, January 2019

Occupation: Retired Instructional Assistant

Comments: Rita comes with a passion for youth and has volunteered as a mentor in Astoria, Oregon, and for Jackson Street. She’s also been a SMART reader and chaired the Board for the Clatsop County Women’s Resource Center for three years. Additionally, she was a part-time office manager for Lutheran Community Services NW, and has worked with high school youth in the various churches she’s attended. “Children are our present and future, and deserve a life of learning, growing, happiness, and love,” Rita says.

Sid Elliott – Treasurer

4436 NW Live Oak Dr, Corvallis, OR 97330

541-23102052 • sabelliott@comcast.net

Elected to board: January 2021

Occupation: Retired from HP, current Instructor at OSU

Comments: Nothing could be more important than ensuring the safety and dignity of our youth. Jackson Street provides the resources and support to at-risk young people in our area to achieve this.

Damian Baxter

606A Baker Street SE, Albany, OR 97321
541-990-3411 • damianbaxter123@gmail.com

Elected to board: June 2022

Occupation: Millwright & Maintenance Technician, Entek LLC

Comments: I'm a prior resident of Jackson Street and have come so far from where I was then. I have never forgotten my experiences from Jackson Street and could not be more excited to help this organization and show everyone what a great place it is with great people. Jackson Street really does welcome all and helps guide us to our own paths of success.

Angela Daniels

2834 Wing Tip Ave NW, Salem, OR, 97304
530-881-6460 • angela.daniels@ofd.com.com

Elected to board: January 2021

Occupation: Director of Supply Chain for OFD Foods

Comments: Jackson Street supports the most positive outcomes for at-risk youth by providing understanding, open-minded, and unbiased adults available to listen, guide, and offer support as youth develop important life skills and learn to relate to each other and find their place in the world.

John Evans

1555 NW Buchanan, Corvallis, OR 97330
541-760-6899 • jcev@comcast.net

Elected to board: January 2021

Occupation: retired minister (FCC Corvallis)

Comments: Jackson Street provides necessary resources for at-risk youth. Through a strong collaborative spirit they are courageously broadening their services. Jackson Street is pointing the way to building a stronger, healthier community.

Gary Lasater

6206 Elena Street NE, Albany, OR 97321
503-871-8161 • gmlasater@email.com

Elected to board: January 2017

Occupation: Retired Youth Worker

Comments: During Gary's career, he served as a juvenile probation officer, juvenile court director, homeless family shelter director, and mental health trainer for Oregon Youth Authority. He believes all youth can be successful if given the right skills and positive support. Gary absolutely believes in the concept of Positive Human Development.

Logan Simpson

1038 Grove Street, Lebanon, OR 97355
541-735-7095 • logansimpson1@outlook.com

Elected to board: June 2022

Occupation: Team Member at OFD

Comments: Both in my life and in the lives of others I've seen the monumental impact that a nonprofit like Jackson Street can have on youth and their futures. When I needed a helping hand, Jackson Street was there over and over; that kind of influence is priceless for youth who feel the world is against them.

Jackson Street Diversity Statement

We are dedicated to ending youth homelessness locally and as part of an important national movement. We are leading local efforts to ensure that youth homelessness is prevented whenever possible, and that unaccompanied youth who do experience homelessness are on a quick path to safe, stable, and permanent housing. We know that certain groups of young people are more likely to experience homelessness and believe we need targeted strategies to speed progress toward ending youth homelessness in our region.

A 2017 study by Voices of Youth Count Chapin Hall shows:

- Disproportionality of homelessness experiences among black youth mirrors racial disparities documented elsewhere, for example in school suspensions, incarceration, and foster care placement.
- Hispanic youth were also found at higher risk of experiencing homelessness than non-Hispanic youth. National survey results suggest that Hispanic youth are especially hidden among those experiencing homelessness.
- Lesbian, gay, bisexual, and transgender (LGBT) youth had a 120% increased risk of experiencing homelessness compared to youth who identified as heterosexual and cisgender. These findings reinforce growing evidence on the heightened risk of experiencing homelessness among LGBT youth. This often stems from a lack of acceptance that young people experience both in and outside of the home.

Our understanding of the impacts of family poverty and LGBT issues has been a cultural diversity strength of our organization, as well as bi-lingual and bi-cultural awareness and practices. We now believe that we must reach deeper and increase cultural competency in race and ethnicity throughout our programs and practices.

We are committed to Youth Voice and empower youth with lived experience, including youth of color as critical partners in designing and implementing service improvements for better outcomes for all. We also will maintain and seek partners who have demonstrated culturally specific expertise.

We acknowledge that our written policies are outdated and although they address equal opportunity for employment as required by law, they are inadequate to address the outcomes and vision we are striving for.

We recognize that advancement of equity may require resources to be invested and are committed to do this.

Jackson Street Board of Directors determined that maintaining excellence in the growth of our programs and operations is only achieved with a diversity, equity and inclusion lens.

Draft 11/20/2019 by AC

Staff review 6/5/2020

Board review 6/11/2020

USDA Non-Discrimination Statement In accordance with Federal civil rights law and U.S. Department of Agriculture (USDA) civil rights regulations and policies, the USDA, its Agencies, offices, and employees, and institutions participating in or administering USDA programs are prohibited from discriminating based on race, color, national origin, sex, religious creed, disability, age, political beliefs, or reprisal or retaliation for prior civil rights activity in any program or activity conducted or funded by USDA. Persons with disabilities who require alternative means of communication for program information (e.g. Braille, large print, audiotape, American Sign Language, etc.), should contact the Agency (State or local) where they applied for benefits. Individuals who are deaf, hard of hearing or have speech disabilities may contact USDA through the Federal Relay Service at (800) 877-8339. Additionally, program information may be made available in languages other than English. To file a program complaint of discrimination, complete the USDA Program Discrimination Complaint Form, (AD-3027) found online at: http://www.ascr.usda.gov/complaint_filing_cust.html, and at any USDA office, or write a letter addressed to USDA and provide in the letter all of the information requested in the form. To request a copy of the complaint form, call (866) 632-9992. Submit your completed form or letter to USDA by: (1) mail: U.S. Department of Agriculture Office of the Assistant Secretary for Civil Rights 1400 Independence Avenue, SW Washington, D.C. 20250-9410;

EMPLOYMENT

EQUAL EMPLOYMENT

It is the policy of Jackson Street to provide equal employment opportunities to all qualified individuals and to administer all aspects and conditions of employment without regard to the following:

- Race
- Color
- Age
- Sex
- Sexual orientation
- Gender
- Gender identity
- Religion
- National origin
- Pregnancy

Diversity

We strive to be knowledgeable and open minded in order to provide an open and non-judgmental place for all.

- Physical or mental disability
- Military or veteran status
- Citizenship and/or immigration status
- Expunged juvenile record
- Genetic information, including family medical history
- Marital status
- Familial relations to another employee or former employee
- Filing for workers' compensation insurance
- Domestic violence victim status
- Credit report or credit history
- Access to employer-owned housing
- Lawful off-duty use of tobacco products
- Child or spousal support withholding
- Wage garnishment for consumer debt
- Bringing of a claim for unlawful employment practices
- Refusal to attend any Jackson Street-sponsored meeting that has the primary purpose of communicating the employer's political or religious views
- Any other protected class, in accordance with applicable federal, state, and local laws

Jackson Street takes allegations of discrimination, intimidation, harassment and retaliation very seriously and will promptly conduct an investigation when warranted.

Equal employment opportunity includes, but is not limited to, employment, training, promotion, demotion, transfer, leaves of absence and termination.

Jackson St Youth Services
Budget July 1, 2022 through June 30, 2023
DRAFT

	<u>Budget</u> <u>2022-2023</u>
Revenue	
Contract/Grant Income	
Government Grants	1,558,234
Total Government Income	1,558,234
Contributed Income	
Contributions	630,000
Planned Grants	400,000
Total Contributed Income	1,030,000
Other Income	
Other	
Total Revenue	2,588,234
Expense	
Personnel	
Salaries	1,843,941
Payroll Taxes & Expenses	199,767
Medical & Retirement Benefits	138,796
Total Personnel	2,182,504
Non-personnel	
Professional services	47,000
Client services	45,000
Occupancy & insurance	95,500
Depreciation expense	42,802
Supp/post/phone/printing	33,000
Staff training	58,000
Vehicles & mileage	2,800
Special Events/Fundraising	15,000
Taxes Licenses Dues Subscriptions	53,000
Total Non-personnel	392,102
Total Expense	2,574,606
Net revenue over/(under) expense	13,629

Jackson Street Youth Shelter, Inc
Profit & Loss
October through December 2022

	<u>Oct - Dec 22</u>
Ordinary Income/Expense	
Income	
4000 · Contributions Income	
4001 · Restricted	1,000.00
4002 · Unrestricted	
4008 · Fall letter	46,105.00
4003 · Annual Giving Campaign	67,562.00
4005 · Monthly/Periodic Giving	11,551.00
4006 · Workplace Giving	5,469.14
4007 · Major Gifts	32,000.00
4002 · Unrestricted - Other	<u>55,502.49</u>
Total 4002 · Unrestricted	<u>218,189.63</u>
Total 4000 · Contributions Income	219,189.63
4100 · Fundraisers	
4102 · Community Efforts	<u>21,852.09</u>
Total 4100 · Fundraisers	21,852.09
4110 · Grants	
4111 · Government	
4112 · Federal	
4303 · Transitional Living Grant	24,962.00
4300 · Street Outreach Program (SOP)	23,920.00
4301 · Basic Center Program	<u>30,158.00</u>
Total 4112 · Federal	79,040.00
4310-1 · State	
4310 · DHS Grants	<u>10,000.00</u>
Total 4310-1 · State	10,000.00
4319 · Local	
4320 · Corvallis CDBG	4,166.67
Corvallis Social Services Funds	3,500.00
4322 · Albany CDBG	<u>1,562.99</u>
Total 4319 · Local	<u>9,229.66</u>
Total 4111 · Government	98,269.66
4330-1 · Private Grants	
4330-3 · Corvallis Shelter Refresh	
4340 · Hillman, Jr Foundation	20,000.00
4335 · Presbyterian Women	<u>-93.76</u>
Total 4330-3 · Corvallis Shelter Refresh	19,906.24
4330-2 · United Way	
4330 · UW - Benton/Lincoln	333.34
4331 · UW - Linn County	<u>916.66</u>
Total 4330-2 · United Way	1,250.00
4332 · Other Private Grants	-1,490.00
4330-1 · Private Grants - Other	2,500.00

Jackson Street Youth Shelter, Inc
Profit & Loss
October through December 2022

	<u>Oct - Dec 22</u>	
Total 4330-1 · Private Grants	<u>22,166.24</u>	
Total 4110 · Grants	120,435.90	
4400-1 · Fees for Services		
4400 · Contracts & MOUs		
4407 · Benton Co Personal Svs CONTRACT	1,811.25	
4406 · Juvenile Departments	-5,772.17	
4400 · Contracts & MOUs - Other	<u>19,705.99</u>	54,207.99
Total 4400 · Contracts & MOUs	15,745.07	19705
4404-1 · Program Fees		14797
4408 · TLP Client Fees	-96.00	
4409 · TLP Client Rent	<u>7,977.78</u>	
Total 4404-1 · Program Fees	<u>7,881.78</u>	
Total 4400-1 · Fees for Services	23,626.85	
4500 · Miscellaneous Income		
4501 · Interest Income	1.88	
4500 · Miscellaneous Income - Other	<u>1,308.98</u>	
Total 4500 · Miscellaneous Income	<u>1,310.86</u>	
Total Income	<u>386,415.33</u>	
Gross Profit	386,415.33	
Expense		
6000-1 · Personnel		
6600 · Payroll		
6005 · Retirement Expense	205.61	
Benefits	0.00	
6001 · Salaries & Wages	372,018.89	
6002 · Payroll Taxes	32,670.49	
6600 · Payroll - Other	<u>368.60</u>	
Total 6600 · Payroll	405,263.59	
6100 · Staff Expense		
6107 · COBRA Administration	225.00	
6106 · Onboarding	366.53	
6101 · Education & Training	5,990.36	
6102 · Travel to Conferences	-30.09	
6103 · Transportation	11,626.85	
6104 · Staff Gifts & Incentives	3,272.11	
6105 · Volunteer Expense	<u>1,237.50</u>	
Total 6100 · Staff Expense	22,688.26	
6200 · Health Insurance	21,399.68	
6201 · Insurance, Worker's Comp	1,432.19	
6000-1 · Personnel - Other	<u>12.50</u>	
Total 6000-1 · Personnel	450,796.22	
6300-1 · Facilities & Infrastructure		
6390 · Facilities & Infrastrc - Other	1,053.00	

Jackson Street Youth Shelter, Inc
Profit & Loss
October through December 2022

	<u>Oct - Dec 22</u>
6300 · Facilities Supplies	
6303 · Furniture	5,256.48
6300 · Facilities Supplies - Other	<u>3,502.80</u>
Total 6300 · Facilities Supplies	8,759.28
6301 · Rent	31,012.00
6310-1 · Repairs	
6311 · Equipment Repairs	<u>858.00</u>
Total 6310-1 · Repairs	858.00
6325 · Utilities	
6320 · Systems Monitoring	431.00
6321 · Electric	3,169.96
6322 · Garbage	749.37
6323 · Natural Gas	620.74
6324 · Water	<u>1,855.84</u>
Total 6325 · Utilities	6,826.91
6330-1 · Information Technology (IT)	
6336 · Computers & Peripherals	1,163.60
6330 · Internet	2,882.12
6331 · Small Equipment & Supplies	590.92
6333 · IT Services & Support	5,563.50
6334 · On-Line Data Services	<u>927.00</u>
Total 6330-1 · Information Technology (IT)	11,127.14
6300-1 · Facilities & Infrastructure - Other	<u>54.97</u>
Total 6300-1 · Facilities & Infrastructure	59,691.30
6500-1 · Program Expenses	
6500 · Program Supplies	951.34
6510 · Resident/Client Expense	
6512 · Food	5,240.49
6511 · Activities	2,491.64
6519 · Clothing	1,117.76
6514 · Personal Supplies	125.38
6516 · Documents	18.38
6521 · Outreach Supplies	1,079.75
6513 · Other Client Supplies	
6518 · Gifts	67.83
6513 · Other Client Supplies - Other	<u>20.00</u>
Total 6513 · Other Client Supplies	<u>87.83</u>
Total 6510 · Resident/Client Expense	10,161.23
6500-1 · Program Expenses - Other	<u>-40.00</u>
Total 6500-1 · Program Expenses	11,072.57
6999-1 · General Expense	
6999 · Advertising	
7000 · Fundraising	1,167.24

Jackson Street Youth Shelter, Inc
Profit & Loss
October through December 2022

	<u>Oct - Dec 22</u>
7001 · Administrative	377.90
6999 · Advertising - Other	<u>300.00</u>
Total 6999 · Advertising	1,845.14
7003 · Bank Service Charges	
7004 · Direct Deposit Fees	192.50
7005 · Credit Card Processing Fees	254.75
7003 · Bank Service Charges - Other	<u>27.00</u>
Total 7003 · Bank Service Charges	474.25
7010 · Miscellaneous	15.00
7011 · Office Supplies	3,193.01
7012 · Postage and Delivery	3,114.41
7013 · Printing and Photocopies	4,394.65
7014 · Professional Fees	
7020 · Accounting	21,383.13
7015 · Consulting	2,748.75
7014 · Professional Fees - Other	<u>1,527.10</u>
Total 7014 · Professional Fees	25,658.98
7018 · Telephone	3,537.77
6999-1 · General Expense - Other	<u>45.00</u>
Total 6999-1 · General Expense	<u>42,278.21</u>
Total Expense	<u>563,838.30</u>
Net Ordinary Income	-177,422.97
Other Income/Expense	
Other Income	
4040-1 · Capital Projects Campaign	
4050 · Cash Contributions	<u>103.00</u>
Total 4040-1 · Capital Projects Campaign	103.00
4200-1 · In-Kind Giving	
4204 · Donated Capital Items	237,490.00
4202 · Donated Services	<u>210.00</u>
Total 4200-1 · In-Kind Giving	<u>237,700.00</u>
Total Other Income	<u>237,803.00</u>
Net Other Income	<u>237,803.00</u>
Net Income	<u><u>60,380.03</u></u>



Request for Applications (RFA): Community Development Block Grant Activities

Applications Due by 5:00 p.m. Thursday, January 19, 2023 (PST)

333 Broadalbin Street SW, PO Box 490, Albany, Oregon 97321-0144 | Planning 541-917-7550

EXHIBIT A: APPLICATION

5.1 Applicant Information

Applicant (organization name): Furniture Share

Contact Person: Michelle Robinson Email: Michelle @furnitureshare.org

Mailing Address: PO Box 2224, Corvallis, OR 97339

Phone #: 541-754-9511 Agency website: WWW.FURNITURESHARE.ORG

UEI #: 12-843-0753 EIN: 93-1282723

Organization Mission Statement:

Our mission is to redistribute quality used furniture & household items and healthy food boxes to children, families, and individuals in need, thus diverting items from the landfill.

5.2 Proposal Summary

Activity/Program Name: Sustaining Client Services to Target Populations through Furniture & Food Delivery and Landfill Diversion program.

Activity Location: 4450 Marion ST SE, Suite C, Albany, OR 97322

Proposal Summary: *Provide a summary of the proposed activity and anticipated outcomes.*

Sustaining Client Services to Target Populations through Furniture & Food Delivery and Landfill Diversion program will administer the delivery of healthy food boxes and redistribution of quality used furniture to 1,100 individuals and families in need to ensure safety, health, comfort, and quality of life to those within the City of Albany. In addition, Furniture Share will divert 170 tons of clean reusable furniture and household items from the landfill. The target clientele of this program is low-income individuals and families, the vast majority qualify as "extremely" low-income. Anticipated activities are to provide 1,100 individuals with a healthy food box, 450 beds for children, 50 Veterans and 450 individuals with 2,750 basic furniture and household items including student desks for remote learning, provide 50 families (an average of 150 individuals) with a dining table and chairs.

ACTIVITY BUDGET FOR WHICH CDBG FUNDS ARE BEING REQUESTED:

CDBG Funding Request	\$	35,000.00
Leveraged Funds/Resources	\$	111,800.00
Total Activity Budget	\$	146,800.00



Request for Applications (RFA): Community Development Block Grant Activities

Applications Due by 5:00 p.m. Thursday, January 19, 2023 (PST)

333 Broadalbin Street SW, PO Box 490, Albany, Oregon 97321-0144 | Planning 541-917-7550

5.3 CDBG Application Narrative

Provide the information requested below **in a separate document** making sure the narrative corresponds to the numbers provided so the required information can be easily found to ensure a complete application. If the question does not apply to the proposed project write N/A.

Activity Description

1. Explain which priorities in Albany's 2023-2027 Consolidated Plan will be addressed by the activity.
2. Describe the community need that will be addressed by the proposed activity.
3. Explain how the activity is an effective strategy to address the identified gap in needs. Provide statistics or evidence to document the activity need.
4. Please specify which CDBG National Objective(s) will be satisfied by the proposed activity.
5. Explain how the project will promote inclusiveness and diversity. Include your agency's nondiscrimination policy for employees and clients as an attachment.
6. For faith-based organizations, explain how your agency will ensure CDBG funded activities are separate from explicitly religious activities such as worship, study of religious text, or evangelizing.

Benefit to low-income Albany residents

7. Who and how many will benefit from activity (estimate # of people, describe clients)?
8. Of these, how many are estimated to be extremely low-income (earning <30% of area median)? Is there any special emphasis on serving extremely low-income residents?

Scope of Work

9. Provide a **DRAFT SCOPE OF WORK** that outlines details about the proposed activity including all actions that will be taken to address the identified need and achieve anticipated performance measures and outcomes, and general accomplishments you intend to achieve with this activity.

Project Feasibility – Readiness to proceed

10. Please describe your readiness to proceed, whether land use or other issues are resolved and whether your organization has the administrative capacity to complete the proposed project. Describe the current organizational capacity to complete and manage the activity within the program year.
11. Please complete the schedule that follows or provide one that is applicable to the activity/project that outlines when major activities will be executed and when the project will be completed.

Organizational Capacity and Activity Sustainability

12. Describe experience and success conducting similar projects, use of federal or CDBG funds.
13. If any issues were raised during a federal program monitoring evaluation, please explain the findings and how issues were resolved.
14. Explain agency experience managing construction projects subject to Davis-Bacon and/or BOLI wage requirements and/or soliciting bids for construction projects.
15. Identify any other agencies or partners for this activity/project and define the roles and responsibilities of these partners.
16. Please explain how the agency embraces and demonstrates diversity within the organization.
17. If not fully funded, will the agency be able to pursue the activity/service (possibly at a reduced scale)?

Financial

18. Why are CDBG funds the best fit/source? Are there other sources of funding for this activity?



Request for Applications (RFA): Community Development Block Grant Activities

Applications Due by 5:00 p.m. Thursday, January 19, 2023 (PST)

333 Broadalbin Street SW, PO Box 490, Albany, Oregon 97321-0144 | Planning 541-917-7550

5.4 Proposed Activity Budget

Provide the activity budget describing total cost, cost per task, existing (secured) project funds and unfunded costs. (DO NOT PROVIDE THE FULL AGENCY BUDGET HERE JUST THE ACTIVITY BUDGET.) Identify any and all source(s) of funding. This would include other Federal and State grants and loans, monetary donations, in-kind contributions, volunteer labor, donation of materials and supplies, etc. **Use the template provided below or your own as long as the same information is provided.**

Activity/Project Budget Summary (See 24 CFR 570 Subpart J)			
Estimated Total Cost of Activity:	\$ 146,800.00		
CDBG Funding Requested for Activity:	\$ 35,000.00		
Total Number of People/Households Served:	1,100 people/367 households		
Total Cost per Person/Household:	\$ 133.45 per person/ \$400 per household		
Total CDBG Cost per Person/Unit	\$ 31.81 per person/ \$5.14 per unit		
Describe Source of Other Funds:	Amount	Amount Secured	Amount Tentative
Federal:			
State:			
Local: CDBG	\$35,000.00		X
Donations/Private:	\$45,000.00		X
Grants:	\$66,800.00		X
Loans:			
Activity Budget Detail (Non-Development Activities)			
Specific Cost Item/Description	CDBG Amount Requested	Other Funds Amount	Total Amount CDBG + Other Sources
CDBG	\$35,000.00	\$	\$35,000.00
Contributions and Fundraising		45,000.00	45,000.00
Grants		66,800.00	68,800.00
Total Revenue	\$35,000.00	\$111,800.00	\$146,800.00
Salary, Taxes and Benefits	\$15,000.00	79,300.00	\$94,300.00
Occupancy-Rent and Utilities	12,500.00	8,500.00	21,000.00
Insurance, Fuel and Truck Maintenance	7,500.00	24,000.00	31,500.00
Total	\$35,000.00	\$111,800.00	\$146,800.00



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5.5 Staff Experience and Qualifications

Identify the names of staff or contractors participating in the proposed program or activity, their role, experience they have in this role, their title, and the expected FTE on the project. **Include in an attachment resumes for key personnel anticipated to work on the proposed program, project, or activity.** Please make sure to identify the person responsible for collecting program performance data and preparing the quarterly reports for the City.

Employee	Experience and Qualifications
Name: Michelle Robinson Title: Executive Director FTE on This Project: .5	BA in Management and Organizational Leadership and 20+ years experience in non-profit management, fundraising, marketing and networking
Name: Ashley Lane Title: Office Manager FTE on This Project: .5	14 years' experience in office management which includes staff supervision, scheduling, accounting, cash handling, marketing and HR
Name: Robert Rogers Title: Warehouse Manager FTE on This Project: .5	12 years' experience with nonprofits and Furniture delivery
Name: Kyle Gray Title: Warehouse Assistant FTE on This Project: .5	2 years' experience with nonprofits and Furniture delivery



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<p>Name: Drew Smythe</p> <p>Title: Development Coordinator</p> <p>FTE on This Project: .5</p>	<p>10 years' experience in Marketing, and business management and 3 years' experience with nonprofits</p>
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CDBG Application Narrative

Furniture Share Activity Description

1. Explain which goals in Albany's 2023-2027 Consolidated Plan will be addressed by the activity.

Our proposed activities will address Goal 1, 2, 3, and 4 within Albany's 2018-2022 Consolidated Plan.

GOAL 1: Support Affordable Housing in Albany-People receiving our services are provided with one item up to a complete house of furniture and household items which frees up funding to afford deposits and moving cost.

GOAL 2: Reduce homelessness by providing Furniture and household items once someone is rehoused by making their house a home and less like become homeless again.

GOAL 3: Increase the availability of needed services to low-income and moderate-income residents with needed public services by supporting service agencies that serve highly vulnerable and underserved populations such as unaccompanied youth, persons with disabilities, the homeless, elderly, and agencies that further fair housing.

GOAL 4: Expand economic opportunities low-income and moderate-income residents by investing in job readiness services, microenterprise development, and economic development programs that create jobs principally for low- or moderate-income residents.

2. Describe the community need that will be addressed by the proposed activity.

Can you imagine a child sleeping on the floor, a family with no table or chairs for eating and completing schoolwork on the floor, or clothing and personal belongings stored in cardboard boxes or garbage bags? Thankfully, most of us cannot. Yet every year in our community many are forced to live without even the most essential household furnishings because after paying for rent and food, they have no money left over to buy the basic furniture that many of us take for granted -- the furnishings that make a house a home.

Furniture Share is the only local non-profit who delivers reused quality furniture and household items filled with fresh fruits, vegetables to benefit low- and extremely low-income individuals, children and families in need creating a suitable living environment. Furniture Share responds to an urgent need and provides a suitable living environment by distributing reusable furniture and household items which complement decent housing. Furniture Share improves infrastructure by helping more than 240 local social service agencies obtain basic furniture needs to increase comfort and safety in their clients' daily lives while assisting them to reach the long-term goal of self-sufficiency. Furniture Share clients are screened for needs assessments and income qualifications and are then referred to us through their case managers.

3. Explain how the activity is an effective strategy to address the identified gap in needs. Provide statistics or evidence to document the activity need.

Can you imagine a child sleeping on the floor, a family with no table or chairs for eating and completing school work on the floor, or clothing and personal belongings stored in cardboard boxes or garbage bags? Thankfully, most of us cannot. Yet every year in our community many are forced to live without even the most essential household furnishings because after paying for rent and food, they have no money left over to buy the basic furniture that many of us take for granted -- the furnishings that make a house a home.

In FY 21/22 FS redirected 33,963 clean reusable furniture and household items equating to 849.1 tons of landfill diversion to 5,032 individuals in need compared to 970 individuals served in FY 06/07. Furniture Share is tackling the prevalent and under-discussed needs of community members who live without the dignity and stability that having sufficient furniture affords for a healthy and productive life. Furniture Share matches people searching for socially responsible ways to transfer their underused belongings to those who are in need of those belongings.

In short, we are turning houses into homes for the people in our communities who need it most, setting them on a path toward true independence and, a better life. In addition, we also create opportunities for youth with barriers to employment and lead a culture of reuse and recycling in our community. In addition to the warmth, comfort, and security that furniture provides, it also plays a crucial, silent role in our lives. For our nearly 5,000

clients per year, furniture has a profound impact on their quality of life, such as the decreased likelihood of re-experiencing displacement or homelessness; Improved physical and mental health; improved financial stability by freeing up funds for other essential items; Increased ability and likelihood to participate in and contribute to the community; Improved relationships with family and friends.

Consider this scenario for the majority of our clients, working full-time at minimum wage:

- \$3,000-\$5,000 Cost for a client to furnish a single person home from a thrift store
- \$1,725 Client monthly salary based on minimum wage
- \$1,536 Market Based Measure for single person-
- Living UNDER \$189 per month for non essential items and basic furnishings

There is a need to increase landfill diversion in the area and to provide low-income children, families and individuals in need with quality REUSE furniture and household items. Valley Landfills, Inc., which operates the Coffin Butte Landfill near Albany, took in 175,000 tons of solid waste in 1995 from twelve western Oregon counties. It now takes in 550,000 tons of solid waste per year, according to PNGC Power (http://www.pngc.com/future/butte_faqs.aspx). As the amount of waste the landfill receives is increasing, the landfill will reach capacity sooner, resulting in more land will have to be dedicated to landfill space - when it could be used for more meaningful and purposeful uses, such as housing, agriculture or recreation.

The need is based on income, although Furniture Share does work on an individual basis (for example, a single father with 3 children whose income was \$40 above the threshold was deemed to be in need). With the current economic climate, more people are in need and the increased need also reflects the current unemployment rate in Linn County which is 4.9%. The current unemployment rate does not include the unemployed who have exhausted their benefits this also is a factor that determined the need. Our job training partnerships assist individuals to become self-sufficient and remove themselves from the "low income" category thus saving both governmental and non-profit organizations money.

Furniture Share also provides both paid and un-paid job training for approximately 20 individuals annually. To provide this service we work in conjunction with DHS and CSC. When a person gains skills which enable them to find work they are able to support themselves and their families and they feel more integrated into their community.

4. Please specify which CDBG National Objective(s) will be satisfied by the proposed activity.

Sustaining Client Services to Target Populations through Furniture & Food Delivery and Landfill Diversion program meets the CDBG National Objective(s):

- Decent Housing
- A suitable living environment
- Eliminate slums or blight, and
- Expand economic opportunity

5. Explain how the project will promote inclusiveness and diversity.

Furniture Share's programs are dedicated to serving all clients referred, who are in need or crisis, with clean quality furniture items and food boxes. We work closely with more than 240 governmental, educational, religious, and non-profit organizations to ensure our client outreach is serving a population as inclusive, equitable, and diverse as the communities we support. Our clients qualify for our program if they are extremely low income by federal guidelines, or provide proof of financial hardship due to uncontrollable circumstance, for example but not limited to, disability, illness, domestic violence, natural disaster, homelessness, substance abuse, etc.

New client referrals and scheduling client service are maintained at a first come first serve basis. As new items are donated, we call all clients on the waitlist in need of those items and this first to schedule claim the furniture. We work with caseworkers to overcome language barriers and ensure if we have the furniture requested every client in need of that item is being contacted regardless of the information and boxes checked on the "client referral form." Every client is served based on their ability to schedule delivery and our availability of their requested items, regardless of the boxes checked or demographic information shared on their referral. Furniture Shares

qualifying component is based on need and income, therefore, cultural is not factor in any qualification. Furniture Share simply serves all low-income families and individual in need regardless their race, ethnicity, gender, religion and age.

6. NA

Benefit to low-income Albany residents

7. Who and how many will benefit from activity (estimate # of people, describe clients)? Of these, how many are estimated to be extremely low-income (earning <30% of area median)?

The estimate the number of unduplicated Albany individuals we expect to serve with the proposed service/activity in FY 2021-2022 (July 1-June 30) is 1,100 clients with an estimate household income of Extremely Low Income (< or = 30% AMI). The beneficiaries of this program are low-income individuals and families, the vast majority qualify as “extremely” low income. These target populations consist of but are not limited to physically or developmentally disabled, frail, elderly, escaping domestic violence, mental illness, homeless and those who have previously experienced (or are at high risk for) homelessness, alcohol or other drug addictions and persons with HIV/AIDS. An estimated total number of people within Albany that fall into the category of our program is 1,100 unduplicated individuals.

8. Of these, how many are estimated to be extremely low-income (earning <30% of area median)? Is there any special emphasis on serving extremely low-income residents?

Furniture anticipates that 100% of our clients will be categorized as extremely low income living in furniture poverty.

Scope of Work

9. Provide a DRAFT SCOPE OF WORK that outlines details about the proposed activity including all actions that will be taken to address the identified need and achieve anticipated performance measures and outcomes, and general accomplishments you intend to achieve with this activity.

Success outcomes are children who sleep in beds with a pillow, sheets, and a blanket often experience better health, improved performance in school, a better relationship with peers and family rather than practicing sleep deprived habits and should experience greater self-confidence. Beds for Kids allow Furniture Share to effectively reach and serve the needs of 450 *vulnerable children* in our community. Providing these families with beds and linen can ensure smooth transitioning to a better *quality of life*. Sleep is one of the most important activities we do to boost the quality of all aspects of our lives. However, for the thousands of children living in poverty, who are sleeping without a bed, getting the proper amount of sleep is just not an option. Without enough sleep, these school-aged children experiencing poverty are put at a serious disadvantage and are unable to learn at their full potential. By giving them the ability to get a good night’s sleep they will be one step closer to completing their education and *breaking the cycle of poverty*. Studies have shown that one of the best ways to break the cycle of poverty is through education and the completion of high school. As well, inadequate sleep when combined with other stress factors, like poverty, can cause higher levels of behavioral problems and put these children at even more of a disadvantage. We need to give school-aged children as many tools as possible to complete and succeed in their education. One of these tools is a bed.

Feeding Our Future effectively reaches and serves the needs of *vulnerable families and children* in our community, providing tables and chairs, benefits to family meals, recipes, and conversational starter tips to ensure smooth transitioning to a better *quality of life and behavior at work or school*. **Feeding our Future** provides 1,100 individuals with healthy food boxes filled with locally grown fruit and vegetables and locally made no preservatives breads and 50 tables and chairs to families. Research data supports the fact that families that eat together have improved nutritional decisions (less obesity), vocabulary and achievement at school or work, greater family stability and family behavior resulting in less violence. The American Public Health Association published the following report. Amid the vast array of scientific literature on reducing teens’ risk for substance use, a new report offers a method as pure and simple as pulling up chairs around the family dinner table. Teens whose families eat dinner together at least five times per week are less likely to smoke, drink and use drugs, according to a recent

report from the National Center on Addiction and Substance Abuse at Columbia University. “This year’s study again demonstrates that the magic that happens at family dinners isn’t the food on the table, but the conversations and family engagement around the table”. When asked about the best part of family dinners, the most frequent answer from teens is the sharing, talking, and interacting with family members. The second most frequent answer is sitting down or being together. It was also found that teens who have frequent family dinners are more likely to report having excellent relationships with their parents and siblings. This project provides dinner tables and chairs, a healthy food box, five simple recipes with 5 items or less, benefits to family meals and conversational starter tips to encourage healthy meals, and easy mealtime steps to improve family conversations and is designed to improve health, education, and family stability along with a performance at school, the workplace, and community. **One of these tools is a dinner table.**

Single parents, families, and other individuals who wish to transition to improved conditions often experience better health, improved performance in jobs and school, better relationships from less worry, and greater self-confidence. Providing Furniture to Individuals in Crisis with recycled furniture and household items can ensure a smooth transition to a better *quality of life*. ***The furniture for Individuals in Crisis*** project seeks to provide basic furniture needs such as a sofa/love seat, end table, coffee table, bookshelf, TV, adult bed and linens, dresser and other furniture needs to 50 veterans and 450 individuals and families. Without a functional living space, families are unable to stabilize their lives or move toward self-sufficiency, improved health, and independence. The challenge of living in an inadequate environment can adversely affect mental and physical health, and significantly increase the probability of repeat hardship. Providing individuals and families with recycled furniture and household items can ensure a smooth transition to a better quality of life. The provision of adequate furnishings is considered both emergency assistance and basic needs fulfillment. With that being said, the degree of improvement to a child’s/human being environment is unmeasurable. Thousands of children will sleep on the floor or on a couch, families eat separately in silence, and a parent cannot read a book to their children because they do not have adequate lighting such as a lamp. These hard-working families which are considered the working poor cannot afford to purchase basic home furnishing. As you can see, overall, this leads to an individual that is educated and more likely to be a contributing member of society. One of the leadership benefits we have seen with this program is the development of community volunteerism...many of our clients are now volunteers.

Project Feasibility – Readiness to proceed

10. Please describe your readiness to proceed, whether land use or other issues are resolved and whether your organization has the administrative capacity to complete the proposed project. Describe the current organizational capacity to complete and manage the activity within the program year.

Furniture Share is governed by a Board of Directors and Programs administered by the Executive Director but not limited to networking, fundraising, event planning and community awareness. Required resources and inputs to implement day-to-day operations and maintain Client Services through Life is Better when a House is a Home program includes adequate staffing and operational hours, volunteer recruitment to organize daily task to secure our programs by managing the Warehouse site, greeting donors and receiving their donations; unpacking donations; organization of donations in the Warehouse space; packing items specific to client requests; interacting with clients and case managers of partnering agencies; tracking client requests; and transferring items we don’t use to other agencies or to recyclers. On average Furniture Share provides services to 420 individuals each month who receive donated items necessary for them to have a functional home such as beds for their children and a dinner table to share family meals. FS accepts donations of used basic household items and furniture, fruits, vegetables and no prescriptive breads from individuals and businesses in the community. Using our 20’ box truck, we pick up and distribute these donated items three days per week within Linn, Benton and surrounding Counties. Other donations are brought to the Warehouse directly by the donors. Staff and volunteers unpack items, sort them, and repack them specific to client needs. Families and individuals then come to the Warehouse to pick up their goods four day a week or they can be delivered directly to their home. Families and individuals are referred through social service agencies.

To execute our services Furniture Share is fortunate to have committed staff and volunteers to achieve our goals. We also have a well diverse and competent board whose qualifications range from business owners, marketing

teams, social service staff, previous clients and a county commissioner who are an active team and encouraged by the Executive Director to include themselves in fundraising and outreach. We collaborate with over 240 local social service agencies and programs who work directly with low-income families, by providing their clients with basic and needed household items. These organizations recognize our services as a valuable resource for their client's overall *transition to self-sufficiency* and *accredit this program with strong support and endorsements*. FS improves infrastructure by helping agencies obtain basic furniture needs to increase comfort and safety in their client's daily lives.

11. Please complete the schedule that follows or provide one that is applicable to the activity/project that outlines when major activities will be executed and when the project will be completed.

Task or Activity	Beginning Date for Each Task	Ending Date for Each Task or Activity
Market the need and obtain Beds, Dinner tables and other basic essential furniture and household items through networking event, social media, volunteer recruitment and education and community training	July 2023	June 2024
Expand storage capacity for recovery and expanded service items	July 2023	Feb 2024
Marketing to target audience	July 2023	June 2024
Sales of material that are not Furniture Share appropriate	First weekend	Once a quarter
Recruit and train volunteers to distribute reuse items	July 2023	June 2024
Tracking/evaluation for project success- monthly	July 2023	June 2024
Collection and Delivery of Healthy Food boxes and furniture recovery items	July 2023	June 2024
Expanded donation pick up service	July 2023	June 2024
Prepare for Run Your TUTU Off	Dec. 2023	Feb. 2024
Prepare for Albany TAPS and CAPS	Jan 2024	March 2024
Prepare for Annual BBQ	Feb. 2023	July 2024
Promotional Presentations & Educational Efforts	July 2023	June 2024
Contact Furniture stores, storage units, estates and property managers with reuse options	July 2023	June 2024

Organizational Capacity and Activity Sustainability

12. Describe experience and success conducting the same or similar projects, use of federal or CDBG funds.

Furniture Share is highly experienced in conducting this project and has done so since 1998. The organization is the only local non-profit that delivers reused quality furniture to benefit low- and extremely low-income individuals, children, and families in need. *The project's effectiveness will be measured* through monthly/quarterly evaluation of progress toward the number of items provided and the households served to the target populations. *Success will be measured* by staff by collecting the following data on a monthly basis to assess the progress toward each objective; the number of elderly individuals, disabled individuals, mentally ill individuals, and families fleeing domestic violence, single female head of household, and homeless /at risk of homelessness individuals served during the fiscal year. Furniture Share also intends to track the total increase in individual and corporate donors and review the level of advertising/public relations activities. By compiling this information monthly, we will be able to *measure our success* on an ongoing basis and make any adjustments to assure the *achievement of our objectives* within the grant period. We have made progress toward meeting the increased demand by implementing more efficient procedures and through the efforts of increased numbers of volunteers and interns.

13. If any issues were raised during a federal program monitoring evaluation, please explain the findings and how issues were resolved.

Furniture Share has always been in compliance with all federal funding received.

14. Explain agency experience managing construction projects subject to Davis-Bacon and/or BOLI wage requirements and/or soliciting bids for construction projects.

Furniture Share has received federal funding since 2001 through Albany CDBG and DEQ and has never had any issues raised during monitoring or compliance with federal regulations. In addition, all invoicing and reporting have been submitted on time.

15. Identify any other agencies or partners for this activity/project and define the roles and responsibilities of these partners.

Furniture Share is the only local non-profit that delivers reused quality furniture at no cost to individuals, children and families in need and to our communities' target populations. There are no other agencies or organizations in the Tri-Counties that provide the distribution of reusable furniture to low-income clients. Furniture Share clients are screened for needs assessments and income qualifications and are then referred to us through their case managers. Furniture Share partners with more than 240 social service agencies to help them reach their goals of helping their clients become self-sufficient.

16. Please explain how the agency embraces and demonstrates diversity within the organization.

Furniture Share embraces and demonstrates diversity within the organization and has had a diversity policy since April 4, 2000 and updated last on June 22, 2021. We also have a diverse board and staff ranging in age from 22 to 69. Ethnicities represented by our board and staff are Caucasian, Native American and Latino. As you can see, we represent and interact with a diverse level of the community. We also embrace and demonstrate diversity by treating all staff and client fairly, created an inclusive culture for all staff and clients, ensuring equal access to opportunities to enable staff and clients to fully develop to their full potential.

Imagine a world where every child recognizes the sacredness of their humanity. And every family has enough to eat, and a place to call home—every child had a bed, no matter the color of their skin or the zip code of their birth. Imagine if everyone could enjoy the bounty of the land that has sustained us for generations, and we could come together to preserve our one and only Earth.

Guided by this vision, Furniture Share is committed to diversity, equity, and inclusion as core values.

Diversity: We appreciate and leverage our differences, and we involve and reflect the communities we serve.

Equity: We align our policies, practices, and resources so that people of all races, cultures, and socioeconomic statuses have genuine opportunities to thrive.

Inclusion: We create an environment in which everyone feels valued and respected.

This commitment is critical to deepening our relevance, credibility, and effectiveness, and it will strengthen our mission to advance a more just, creative, and abundant future where people and planet thrive. Equity means receiving what one needs to succeed, as we are not all born with the same opportunities.

We approach our work on diversity, equity, and inclusion with courage and optimism—knowing it requires a sustained commitment. When we make mistakes along the way, we will adapt and continue to learn.

17. If not fully funded, will the agency be able to pursue the activity/service (possibly at a reduced scale)?

Partial funding would result in decreased hours of operation and deliveries causing a significant reduction in the number of children who will receive a bed, pillow, sheets and blanket, fewer families receiving a dinner table to share family meals and fewer individuals receiving basic furniture needs. The waiting period for our services would increase causing a backlog. Furniture Share is making great progress toward serving more clients than ever before so that children may improve health, performance at school, and help the family transition to self-sufficiency. If this project is not fully funded clients will have longer wait times for furniture and household items. Additionally, the wait times for furniture pickups will be longer for furniture donors which can equate to the loss

of donated items that would have gone to our clients. We will be able to pursue the service but at a slower time frame to fewer clients living in furniture poverty.

Financial

18. Why are CDBG funds the best fit/source? Are there other sources of funding for this activity?

FS is the only local non-profit that delivers reused quality furniture to benefit low- and moderate-income individuals, children, and families in need creating a suitable living environment. Our services provide improved family interactions, increased comfort, and safety in homes, and the ability to sleep comfortably, eat meals together, and study comfortably. To ensure safety, health, comfort, and quality of life for those living within the City of Albany, FS responds to an urgent need and provides a suitable living environment by distributing reusable furniture and household items which complement decent housing and help eliminate slums and blight. FS improves infrastructure by helping social service agencies obtain basic furniture needs to increase comfort and safety in their clients' daily lives while assisting them to reach the long-term goal of self-sufficiency.

There are other sources of funding for this activity, however, it is very limited, and we reach out to every possible funding opportunity to provide our valuable services to our neighbors living in furniture poverty.

(541) 730-2421

Supervised Employees, Daily and Weekly Store Reports, Created Employee Schedule, Coordinate Weekly Meetings, Trained New Employees, Responsible for Hiring and Terminating Employees, Weekly and Monthly Financials, Customer Service, Prepared Yearly Budgets.

Michelle Maddux-Robinson**PO Box 2224****Corvallis, Oregon 97339****(541) 730-2421****VOLUNTEER EXPERIENCE:**

Altrusa-KIDZSHOP	2011-Present
Relay For Life-Survivor Chair-Linn and Benton County	2011-14
Cornerstone Fundraising Committee	2011-15
Lebanon Chamber Ambassador	2010-14
Rotary of Corvallis-Youth Exchange Chair	2007-13
Salvation Army Volunteer- Linn and Benton County	2006-11
CASA Volunteer-Linn County CASA	2005-2007
ILP Volunteer- Independent Living Program	2005-2007
American Business Woman Association-Vice President	2004-2005
ABWA-Membership Coordinator	2004-2005
ABWA-Fundraising Coordinator	2001-2004

EDUCATION:

Accounting Certificate	Linn-Benton Community College	Albany, OR	2001
Bachelors of Applied Science	George Fox University	Newberg, OR	2003
Business Management and Organizational Leadership			
Grant Writing Certificate	The Grant Institute	Portland, OR	2004

PROFESSIONAL AFFILIATIONS:

Twice Upon A Time –Board Member	Corvallis, OR	2005-2006
ABWA-Board Member/Officer/Committee Chair	Corvallis, OR	2001-2005

TRAINING:

CASA Volunteer Training	CASA-Voices for Children	Corvallis, OR	2004
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CASA-Voices for Children- Strategic Planning, Grant Writing, Marketing Strategies, Independent Education Plan, Independent Living Plan, DHS Policy and Procedure, Benton County Court Policy and Procedure, Foster Care System Youth Development, Youth in the Foster Care System, Juvenal Delinquency

Mid-Valley Development Professionals (MVDP)- Major Gift Giving, What High End Donors are Looking For, Effective Tools for Communicating Your Policy Goal to Policymakers, Building Better Communities, The Value Driven Organization, Grant Writing

Oregon Commission on Children and Families- Bipartisan Political Effectiveness, Keys to Effective Groups, Winning Hearts and Minds: Engaging and Motivating your Community, Social and Cause Marketing, Youth Leadership, Youth Development, Youth Voice, Taking Flight Through the Stars: Being a Leader without Boundaries, Strategic Planning



Request for Applications (RFA): Community Development Block Grant Activities

Applications Due by 5:00 p.m. Thursday, January 19, 2023

333 Broadalbin Street SW, Albany, Oregon 97321-0144 | BUILDING 541-917-7553 | PLANNING 541-917-7550

Exhibit B: REQUIRED CDBG CERTIFICATIONS

If this agency (name): Furniture Share is awarded funding, the agency agrees that:

1. The recipient has a DUNS # and is or will be registered in the U.S. System for Award Management at <http://sam.gov> before contract award and will update registration as necessary.
2. The recipient will provide liability insurance coverage as required by the City of Albany, and worker's compensation and payment of payroll taxes as required by Federal and State laws.
3. All expenditures must have adequate documentation and all accounting records and supporting documentation shall be available for inspection by City of Albany upon request, and funds will not be used to provide services/assistance for the same costs/losses from other funding sources.
4. All procurement (purchase) transactions regardless of whether negotiated or advertised and without regard to dollar value shall be conducted in a manner to provide maximum open free competition.
5. Financial records, support documentation, statistical records, and all other records pertinent to funding shall be retained for a period of ten years following completion of project/activity.
6. The recipient shall establish safeguards to prohibit employees from using their positions for a purpose that has the appearance of being motivated by a desire for private gain for themselves or others.
7. All materials submitted shall become public records retained by the City of Albany, except that late applications will be returned to the applicant without further review.
8. No person, on the basis of race, color, national origin, sex, gender identity, familial status, religion, disability, age, veteran status, or any other characteristic protected under applicable federal, state, or local laws should be excluded from participation in, be denied the benefit of, or be otherwise subjected to discrimination under the program or activity funded in whole or part by CDBG funds. The funding recipient agrees to furnish copies of applicable policies and procedures upon request.
9. Employment made by or resulting from CDBG funding from the City of Albany shall not discriminate against any employee or applicant on the basis of disability, age, race, color, religion, sex, or national origin.
10. None of the funds, materials, property, or services provided directly or indirectly under CDBG funding from the City of Albany shall be used for any partisan political activity, or to further the election or defeat of any candidate for public office.
11. Letter of commitment from other funding sources and/or letters of support for your project shall be furnished to the City of Albany upon request.
12. **Authorization to request funds:** I acknowledge the statements above and certify the information contained in this application is true and correct. I further understand material omission or false information contained in this application constitutes grounds for disqualification.

Michelle Maddux-R

Signature

01/14/2023

Date

Michelle Robinson, Executive Director
Printed Name and Title



Request for Applications (RFA): Community Development Block Grant Activities

Applications Due by 5:00 p.m. Thursday, January 19, 2023 (PST)

333 Broadalbin Street SW, PO Box 490, Albany, Oregon 97321-0144 | Planning 541-917-7550

Exhibit C: CONFLICT OF INTEREST CERTIFICATION

Applicant has no conflict of interests with any City of Albany appointed or elected representatives and does not employ City appointed or elected representatives or their families.

Conflict of Interest. The undersigned Applicant and each person signing on behalf of the Applicant certifies, and in the case of a sole proprietorship, partnership, or corporation, each party thereto certifies as to its own organization, under penalty of perjury, that to the best of their knowledge and belief, no member of the City Council, officer, employee, or person, whose salary is payable in whole or in part by the City, has a direct or indirect financial interest in the award of funds, or in the services to which this Application relates, or in any of the profits, real or potential, thereof, except as noted otherwise herein. The undersigned hereby submits this Application to furnish all services and activities as indicated in the Application submittal.

Furthermore, Applicant must disclose any real or perceived conflict of interest, current or past relationships with City of Albany employees, appointed or elected officials associated with this program.

Disclosure: _____

SIGNATURE OF AUTHORIZED PERSON:

(notarization is not required)

The Applicant hereby certifies that the information contained in these certifications and representations is accurate, complete, and current.

<u>Furniture Share</u>	<u>541-754-9511</u>
Applicant's Agency Name	Phone Number

Michelle Maddux-R

Signature

01/14/2023

Date

Michelle Robinson, Executive Director

Printed Name and Title

Section 3 Business or Individual *(check applicable box):*

☐ Yes ☒ No

Disadvantaged, Minority, Emerging Small Business (DMESB) *(check applicable box):*

☐ Yes ☒ No



Request for Applications (RFA): Community Development Block Grant Activities

Applications Due by 5:00 p.m. Thursday, January 19, 2023

333 Broadalbin Street SW, Albany, Oregon 97321-0144 | BUILDING 541-917-7553 | PLANNING 541-917-7550

Exhibit D: ANTI-LOBBYING STATEMENT

The anti-lobbying provisions will apply to any person who is an employee, agent, consultant, officer, elected or appointed official of the subrecipient that is receiving CDBG or CDBG-CV funds.

Applicant certifies that:

1. No Federal funds have been paid or will be paid, by or on behalf of the applicant agency, to any person for influencing or attempting to influence an officer or employee of the awarding of any Federal, state or municipal contract, the making of any Federal or municipal grant, the making of any Federal or municipal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment or modification of any Federal, state or municipal contract, grant, loan or cooperative agreement.
2. If any funds other than Federal funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any Federal or municipal agency/department, Member of Congress, an officer or employee of Congress, an employee of a Member of Congress, Mayor, City Council member, or employee of the Mayor or a City Council member in connection with this application, contract, grant, loan or cooperative agreement, it will complete and submit Standard Form-LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions; and
3. It will require that the language of paragraph 1 and 2 of this anti-lobbying certification be included in the award documents for all subcontractor awards at all tiers.

SIGNATURE OF AUTHORIZED PERSON:

(notarization is not required)

Michelle Maddux-R

Signature

01/14/2023

Date

Michelle Robinson, Executive Director

Printed Name and Title



Request for Applications (RFA): Community Development Block Grant Activities

Applications Due by 5:00 p.m. Thursday, January 19, 2023

333 Broadalbin Street SW, Albany, Oregon 97321-0144 | BUILDING 541-917-7553 | PLANNING 541-917-7550



EXHIBIT E - APPLICANT REPRESENTATIONS AND CERTIFICATION REGARDING DEBARMENT, SUSPENSION AND OTHER RESPONSIBILITIES

The Applicant certifies to the best of its knowledge and belief by initialing next to each statement that neither it nor any of its principals:

1. MMR Are presently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from submitting bids or Applications by and federal, state or local entity, department or agency;
2. MMR Have within a five-year period preceding the date of this certification been convicted of fraud or any other criminal offense in connection with obtaining, attempting to obtain, or performing a public (federal, state, or local) contract embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
3. MMR Are presently indicted for or otherwise criminally charged with commission of any of the offenses enumerated in Paragraph 2 of this certification;
4. MMR Have, within a five-year period preceding the date of this certification had a judgment entered against contractor or its principals arising out of the performance of a public or private contract;
5. MMR Have pending in any state or federal court any litigation in which there is a claim against applicant or any of its principals arising out of the performance of a public or private contract; and
6. MMR Have within a five-year period preceding the date of this certification had one or more public contracts (federal, state, or local) terminated for any reason related to contract performance or compliance.

If Applicant is unable to attest to any of the statements in this certification, Applicant shall attach an explanation to the Application. The inability to certify to all of the statements may not necessarily preclude the Applicant from award of a contract under this procurement.

SIGNATURE OF AUTHORIZED PERSON:

(notarization is not required)

Michelle Maddux-R

Signature

01/14/2023

Date

Michelle Robinson, Executive Director

Printed Name and Title

EXHIBIT F – CERTIFICATION OF INSURANCE REQUIREMENTS

All Subrecipients shall at all times maintain insurance in the coverage limits noted below at Applicant's expense.

Preferred limits below may be adjusted on a case by case basis.

Workers' Compensation insurance in compliance with ORS 656.017, which requires subject employers to provide workers' compensation coverage in accordance with ORS Chapter 656 or CCB (Construction Contractors Board) for all subject workers. Contractor and all subcontractors of Contractor with one or more employees must have this insurance unless exempt under ORS 656.027. **Employer's Liability Insurance with coverage limits of not less than \$1,000,000 must be included. If Contractor does not have coverage, and claims to be exempt, Contractor must indicate exemption below with qualified reasons for exemption, ORS 656.027.** Out-of-state Contractors with one or more employees working in Oregon in relation to this Contract must have Workers' Compensation coverage from a state with extraterritorial reciprocity, or they must obtain Oregon specific Workers' Compensation coverage ORS 656.126. ☐ Check this box if Contractor is exempt and provide qualified reason: _____

Professional Liability insurance covering any damages caused by error, omission or any negligent acts of the Contractor, its subcontractors, agents, officers, or employees' performance under this Contract. **Combined single limit per occurrence shall not be less than \$2,000,000. Annual aggregate limit shall not be less than \$2,000,000.** If coverage is on a claims-made basis, then either an extended reporting period of not less than 24 months shall be included in the Professional Liability insurance coverage, or Contractor shall provide **Tail Coverage**.

- ☐ If this box is checked, the limits shall be \$1,000,000 per occurrence and \$1,000,000 in annual aggregate.
☐ Required by City ☒ Not Required by City (Needs Finance Insurance Review and Approval.)

Commercial General Liability insurance with coverage satisfactory to the City on an occurrence basis. **Combined single limit shall not be less than \$2,000,000 per occurrence for Bodily Injury and Property Damage and annual aggregate limit for each shall not be less than \$3,000,000.** Coverage may be written in combination with Automobile Liability Insurance (with separate limits). **Annual aggregate must be on a "per project basis".** A combination of primary and **Excess/Umbrella insurance** may be used to meet the required limits of insurance.

- ☐ If this box is checked, the limits shall be \$1,000,000 per occurrence and \$2,000,000 in annual aggregate.
☐ If this box is checked, the limits shall be \$5,000,000 per occurrence and \$5,000,000 in annual aggregate.
☒ Required by City ☐ Not Required by City (Needs Finance Insurance Review and Approval.)

Automobile Liability covering all owned, non-owned, or hired vehicles. This coverage may be written in combination with the Commercial General Liability insurance (with separate limits). **Combined single limit per occurrence shall not be less than \$2,000,000.** Use of personal automobile liability insurance coverage may be acceptable if evidence that the policy includes a business use endorsement is provided.

- ☐ If this box is checked, the limits shall be \$1,000,000 per occurrence.
☐ If this box is checked, the limits shall be \$5,000,000 per occurrence.
☒ Required by City ☐ Not Required by City (Needs Finance Insurance Review and Approval.)

Pollution Liability covering Contractor's or appropriate subcontractor's liability for bodily injury, property damage and environmental damage resulting from sudden accidental and gradual pollution and related cleanup costs incurred by Contractor, all arising out of the Goods delivered or Services (including transportation risk) performed under this Contract is required. If this coverage is on a claims-made basis, the policy must provide a 24-month extended reporting period. **Coverage must have a limit of not less than \$2,000,000 per incident/claim and \$2,000,000 policy annual aggregate.**

- ☐ Required by City ☒ Not Required by City (Needs Finance Insurance Review and Approval.)

Sexual Abuse and Molestation for the duration of the contract and for the period of time in which Contractor is providing business services. **Coverage must include limits of not less than \$1,000,000.**

☐ Required by City ☒ Not Required by City (Needs Finance Insurance Review and Approval.)

Coverage must be provided by an insurance company authorized to do business in Oregon or rated by A.M. Best's Insurance Rating of no less than A-VII or City approval. Contractor's coverage will be primary in the event of loss and state the deductible or retention level. Contractor shall provide a current Certificate of Insurance and renewal upon expiration of any of the required coverages. Contractor shall immediately notify the City of any change in insurance coverages.

Additional Insured - the City must be listed as an Additional Insured by endorsement for any General Liability policy on a primary and non-contributory basis. Such coverage will specifically include products and completed operations coverage.

Description of Operations shall state: "Project Name: The City of Albany, its officers, employees and agents are additional insureds with respect to Contractor's activities to be performed under this Contract. Coverage shall be primary and non-contributory with any other insurance and self-insurance, (include the number). This form is subject to policy terms, conditions and exclusions."

A copy of the endorsement shall be attached to the Certificate of Liability Insurance. Contractor shall provide complete copies of insurance policies if requested by the City.

Certificate holder shall be listed as: City of Albany, P.O. Box 490, Albany, OR 97321. Certificates of Insurance may be emailed to City of Albany, Finance Dept., Diane Murzynski, at insurance@cityofalbany.net.

Signature Block:

Michelle Maddux-R

Applicant's Acceptance: Michelle Robinson Date: 01/14/2023

Company Name: Furniture Share



Request for Applications (RFA): Community Development Block Grant Activities

Applications Due by 5:00 p.m. Thursday, January 19, 2023

333 Broadalbin Street SW, Albany, Oregon 97321-0144 | BUILDING 541-917-7553 | PLANNING 541-917-7550

Exhibit G: RELIGIOUS/FAITH-BASED ORGANIZATION CERTIFICATION

If the agency is or represents that it is, or may be deemed to be, a religious or denominational institution or organization or an organization operated for religious purposes. The agency agrees that, in connection with such community development activities and operational costs:

1. It will not discriminate against any persons seeking CDBG-funded services and/or related services on the basis of religion or religious belief; and
2. It will not use CDBG funds to support any inherently religious activities, such as worship, religious instruction, or proselytization.

The agency/subrecipient is NOT a religious organization.

Michelle Maddux-R

Signature

01/14/2023

Date

Michelle Robinson, Executive Director

Printed Name and Title

Furniture Share

Agency Name

The agency/subrecipient IS a religious or faith-based organization and agree to follow terms above.

Signature

Date

Printed Name and Title

Agency Name

2022-23 Budget Life is Better when a House is a Home

Sustaining Client Services through Food & Furniture Delivery and Landfill Diverson

Beds for Kids, Feeding Our Future, Wildfire Furniture Relief Program & Veteran Welcome Home Kits

Income

Linn County United Way				\$	10,000.00
Benton County United Way				\$	10,000.00
Lincoln County United Way				\$	10,000.00
Grants				\$	230,000.00
Contributions				\$	80,000.00
Special Event-Albany Taps and Caps				\$	8,000.00
Special Events-BBQ				\$	50,000.00
Special Events-Run Your Tutu Off				\$	15,000.00
Special Events-Beds For Kids				\$	27,000.00
Total Income				\$	440,000.00

Expenses

<i>Personnel</i>					
Executive Director				\$	80,000.00
Fundraising and Development Manager				\$	45,000.00
Client Service/Partner Liason Coordinator Office Manager				\$	45,000.00
Client/Delivery Assistant				\$	40,000.00
Client/Delivery Driver Warehouse Manager				\$	45,000.00
Payroll Taxes				\$	30,030.00
Medical/Dental Benefits				\$	18,000.00
Total Personnel				\$	303,030.00

<i>Occupancy</i>					
<i>Rent</i>				\$	48,000.00
Telephone/internet/utilities				\$	21,000.00
Total Occupancy				\$	69,000.00

<i>Materials & Services</i>					
Postage				\$	1,850.00
Supplies				\$	3,200.00
Equipment				\$	3,500.00
Printing				\$	2,500.00
Advertising				\$	2,500.00
Fundraising				\$	4,500.00
Insurance				\$	8,000.00
Dues/Memberships				\$	2,000.00
Professional Fees/Accounting				\$	5,750.00
Donor & Volunteer Appreciation				\$	3,000.00
Milage, Maintenance and equipment repair				\$	31,170.00
Total Materials & Services				\$	67,970.00
Total Expense				\$	440,000.00
Net Income/Loss				\$	-
Emergency Reserves				\$	90,810.61

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12/08/22

Accrual Basis

Benton Furniture Share
Balance Sheet
As of November 30, 2022

	Nov 30, 22
ASSETS	
Current Assets	
Checking/Savings	
Checking	144,606.18
PayPal	75,017.11
Petty Cash	500.00
Total Checking/Savings	220,123.29
Total Current Assets	220,123.29
Fixed Assets	
Vehicle	16,000.00
Accumulated Depreciation	-16,000.00
Total Fixed Assets	0.00
Other Assets	
Prepaid Expenses	3,500.00
Total Other Assets	3,500.00
TOTAL ASSETS	223,623.29
LIABILITIES & EQUITY	
Liabilities	
Current Liabilities	
Accounts Payable	
*Accounts Payable	-3,500.00
Total Accounts Payable	-3,500.00
Total Current Liabilities	-3,500.00
Total Liabilities	-3,500.00
Equity	
Net Income	227,123.29
Total Equity	227,123.29
TOTAL LIABILITIES & EQUITY	223,623.29

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12/08/22

Accrual Basis

Benton Furniture Share

Profit & Loss

November 2022

	Nov 22	Jul - Nov 22
Ordinary Income/Expense		
Income		
United Way Grants		
Linn County United Way	11,124.99	15,624.95
Total United Way Grants	11,124.99	15,624.95
Grant Income		
Benton Community Foundation	0.00	9,500.00
Benton Sheriff's Foundation	400.00	400.00
EFSP 39	0.00	1,414.50
EFSP ARPAP	0.00	6,250.00
Lions Club	0.00	1,000.00
Charles & Anna Pedrazzini PCF	0.00	3,000.00
Oregon Community Foundation	0.00	25,000.00
Ralph Hull Foundation	0.00	20,000.00
Reeser Foundation	12,000.00	12,000.00
Salem Foundation	0.00	500.00
Samaritan Health Services	52,000.00	52,000.00
Total Grant Income	64,400.00	131,064.50
Contribution Income		
Contributions	2,089.40	9,104.67
Total Contribution Income	2,089.40	9,104.67
Fund Raising		
ASK Event		
ASK Event Income	20,500.00	37,597.65
ASK Event Expenses	0.00	-2,222.77
Total ASK Event	20,500.00	35,374.88
BBQ		
Sponsors	0.00	20,800.00
Ticket Sales/Auction	0.00	26,491.96
Barbecue Expenses	0.00	-4,065.29
Total BBQ	0.00	43,226.67
Run Your TuTu Off		
Run Your TuTu Off Expenses	-125.68	-225.68
Total Run Your TuTu Off	-125.68	-225.68
Donor Designated Funds		
Beds For Kids		
Beds For Kids Income	1,745.00	2,750.20
Total Beds For Kids	1,745.00	2,750.20
Total Donor Designated Funds	1,745.00	2,750.20
Total Fund Raising	22,119.32	81,126.07
Total Income	99,733.71	236,920.19
Expense		
Wages & Fringe Benefits		
Executive Director	6,666.66	33,333.30
Director of Development	0.00	7,639.75
Development Coordinator	3,750.00	18,071.00
Partner Liaison Coordinator	3,096.00	15,939.00
Delivery Driver Wages		
Delivery Driver	2,831.00	13,043.50
Client/Delivery Assistant	1,875.00	8,947.50
Total Delivery Driver Wages	4,706.00	21,991.00

Benton Furniture Share
Profit & Loss
October 2022

	Oct 22	Jul - Oct 22
Ordinary Income/Expense		
Income		
United Way Grants		
Linn County United Way	1,124.99	4,499.96
Total United Way Grants	1,124.99	4,499.96
Grant Income		
EFSP 39	1,414.50	1,414.50
EFSP ARPAP	6,250.00	6,250.00
Lions Club	1,000.00	1,000.00
Benton Community Foundation	9,500.00	9,500.00
Charles & Anna Pedrazzini PCF	0.00	3,000.00
Oregon Community Foundation	0.00	25,000.00
Ralph Hull Foundation	0.00	20,000.00
Salem Foundation	0.00	500.00
Total Grant Income	18,164.50	66,664.50
Contribution Income		
Contributions	1,778.24	7,015.27
Total Contribution Income	1,778.24	7,015.27
Fund Raising		
ASK Event		
ASK Event Income	13,347.65	17,097.65
ASK Event Expenses	-567.38	-2,222.77
Total ASK Event	12,780.27	14,874.88
BBQ		
Sponsors	0.00	20,800.00
Ticket Sales/Auction	0.00	26,491.96
Barbecue Expenses	0.00	-4,065.29
Total BBQ	0.00	43,226.67
Run Your TuTu Off		
Run Your TuTu Off Expenses	-100.00	-100.00
Total Run Your TuTu Off	-100.00	-100.00
Donor Designated Funds		
Beds For Kids		
Beds For Kids Income	0.00	1,005.20
Total Beds For Kids	0.00	1,005.20
Total Donor Designated Funds	0.00	1,005.20
Total Fund Raising	12,680.27	59,006.75
Total Income	33,748.00	137,186.48
Expense		
Wages & Fringe Benefits		
Executive Director	6,666.66	26,666.64
Director of Development	0.00	7,639.75
Development Coordinator	3,750.00	14,321.00
Partner Liaison Coordinator	3,168.00	12,843.00
Delivery Driver Wages		
Delivery Driver	2,983.00	10,212.50
Client/Delivery Assistant	1,725.00	7,072.50
Total Delivery Driver Wages	4,708.00	17,285.00
Payroll Taxes	1,890.37	7,774.62
Total Wages & Fringe Benefits	20,183.03	86,530.01

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11/10/22
Accrual Basis

Benton Furniture Share

Profit & Loss

October 2022

	Oct 22	Jul - Oct 22
Occupancy		
Rent	3,500.00	13,250.00
Repairs & Maintenance	385.00	1,413.90
Utilities		
Electricity	-134.35	612.27
Garbage/Disposal	0.00	537.85
Sewer/ Water	0.00	-12.27
Telephone/Internet	152.18	2,246.34
Total Utilities	17.83	3,384.19
Total Occupancy	3,902.83	18,048.09
Operating Expenses		
Advertising	1,000.00	1,575.00
Bank Charge	14.95	59.80
Dues/Memberships/Training/Conf.	9,018.59	9,786.97
PayPal Fees	17.33	66.36
Postage	0.00	166.00
Printing & Photocopy	258.99	539.93
Staff Appreciation	0.00	762.24
Supplies	107.25	1,656.25
Total Operating Expenses	10,417.11	14,612.55
Professional Fees		
Accounting	0.00	875.00
Consultant	0.00	1,164.00
Total Professional Fees	0.00	2,039.00
Insurance		
Liability Insurance	313.59	1,501.39
Total Insurance	313.59	1,501.39
Volunteer		
Volunteer & Donor Appreciation	15.51	649.17
Total Volunteer	15.51	649.17
Auto		
Auto License/Registration	34.00	34.00
Fuel	1,226.00	3,257.45
Insurance	69.00	4,579.00
Mileage, Maint, Equip. Repair	144.95	483.92
Total Auto	1,473.95	8,354.37
Total Expense	36,306.02	131,734.58
Net Ordinary Income	-2,558.02	5,451.90
Other Income/Expense		
Other Income		
Carryover	0.00	149,846.95
Total Other Income	0.00	149,846.95
Net Other Income	0.00	149,846.95
Net Income	-2,558.02	155,298.85

10:29 AM

11/10/22

Accrual Basis

Benton Furniture Share

Balance Sheet

As of October 31, 2022

	Oct 31, 22
ASSETS	
Current Assets	
Checking/Savings	
Checking	79,955.87
PayPal	74,582.44
Petty Cash	500.00
Total Checking/Savings	155,038.31
Total Current Assets	155,038.31
Fixed Assets	
Vehicle	16,000.00
Accumulated Depreciation	-16,000.00
Total Fixed Assets	0.00
Other Assets	
Prepaid Expenses	3,500.00
Total Other Assets	3,500.00
TOTAL ASSETS	158,538.31
LIABILITIES & EQUITY	
Liabilities	
Current Liabilities	
Accounts Payable	
*Accounts Payable	3,239.46
Total Accounts Payable	3,239.46
Total Current Liabilities	3,239.46
Total Liabilities	3,239.46
Equity	
Net Income	155,298.85
Total Equity	155,298.85
TOTAL LIABILITIES & EQUITY	158,538.31

10:59 AM

10/10/22

Accrual Basis

Benton Furniture Share

Balance Sheet

As of September 30, 2022

	Sep 30, 22
ASSETS	
Current Assets	
Checking/Savings	
Checking	80,748.81
PayPal	74,148.77
Petty Cash	500.00
Total Checking/Savings	155,397.58
Total Current Assets	155,397.58
Fixed Assets	
Vehicle	16,000.00
Accumulated Depreciation	-16,000.00
Total Fixed Assets	0.00
Other Assets	
Prepaid Expenses	3,500.00
Total Other Assets	3,500.00
TOTAL ASSETS	158,897.58
LIABILITIES & EQUITY	
Liabilities	
Current Liabilities	
Accounts Payable	
*Accounts Payable	736.00
Total Accounts Payable	736.00
Total Current Liabilities	736.00
Total Liabilities	736.00
Equity	
Net Income	158,161.58
Total Equity	158,161.58
TOTAL LIABILITIES & EQUITY	158,897.58

Benton Furniture Share

Profit & Loss

September 2022

	Sep 22	Jul - Sep 22
Ordinary Income/Expense		
Income		
United Way Grants		
Linn County United Way	1,124.99	3,374.97
Total United Way Grants	1,124.99	3,374.97
Grant Income		
Charles & Anna Pedrazzini PCF	0.00	3,000.00
Oregon Community Foundation	0.00	25,000.00
Ralph Hull Foundation	0.00	20,000.00
Salem Foundation	0.00	500.00
Total Grant Income	0.00	48,500.00
Contribution Income		
Contributions	2,189.04	5,237.03
Total Contribution Income	2,189.04	5,237.03
Fund Raising		
ASK Event		
ASK Event Income	3,750.00	3,750.00
ASK Event Expenses	-738.00	-738.00
Total ASK Event	3,012.00	3,012.00
BBQ		
Sponsors	2,500.00	20,800.00
Ticket Sales/Auction	0.00	26,491.96
Barbecue Expenses	0.00	-4,245.28
Total BBQ	2,500.00	43,046.68
Donor Designated Funds		
Beds For Kids		
Beds For Kids Income	0.00	1,005.20
Bed For Kids Expenses	0.00	-488.93
Total Beds For Kids	0.00	516.27
Veterans Welcome Home		
Veterans Welcome Home Expenses	-187.62	-187.62
Total Veterans Welcome Home	-187.62	-187.62
Total Donor Designated Funds	-187.62	328.65
Total Fund Raising	5,324.38	46,387.33
Total Income	8,638.41	103,499.33
Expense		
Wages & Fringe Benefits		
Executive Director	6,666.66	19,999.98
Director of Development	0.00	7,639.75
Development Coordinator	3,750.00	10,571.00
Partner Liaison Coordinator	2,997.00	9,675.00
Delivery Driver Wages		
Delivery Driver	2,014.00	7,229.50
Client/Delivery Assistant	1,762.50	5,347.50
Total Delivery Driver Wages	3,776.50	12,577.00
Payroll Taxes	1,343.34	5,884.25
Total Wages & Fringe Benefits	18,533.50	66,346.98
Occupancy		
Rent	3,500.00	9,750.00
Repairs & Maintenance	0.00	1,028.90

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10/10/22

Accrual Basis

Benton Furniture Share

Profit & Loss

September 2022

	Sep 22	Jul - Sep 22
Utilities		
Electricity	202.00	746.62
Garbage/Disposal	0.00	311.35
Sewer/ Water	0.00	-12.27
Telephone/Internet	451.65	2,094.16
Total Utilities	653.65	3,139.86
Total Occupancy	4,153.65	13,918.76
Operating Expenses		
Advertising	475.00	575.00
Bank Charge	14.95	44.85
Dues/Memberships/Training/Conf.	215.00	724.28
PayPal Fees	16.44	49.03
Postage	166.00	166.00
Printing & Photocopy	44.98	280.94
Staff Appreciation	568.24	762.24
Supplies	162.68	1,575.74
Total Operating Expenses	1,663.29	4,178.08
Professional Fees		
Accounting	0.00	875.00
Consultant	0.00	1,164.00
Total Professional Fees	0.00	2,039.00
Insurance		
Liability Insurance	382.60	1,187.80
Total Insurance	382.60	1,187.80
Volunteer		
Volunteer & Donor Appreciation	295.07	633.66
Total Volunteer	295.07	633.66
Auto		
Fuel	590.00	2,031.45
Insurance	4,510.00	4,510.00
Mileage, Maint, Equip. Repair	310.00	338.97
Total Auto	5,410.00	6,880.42
Total Expense	30,438.11	95,184.70
Net Ordinary Income	-21,799.70	8,314.63
Other Income/Expense		
Other Income		
Carryover	0.00	149,846.95
Total Other Income	0.00	149,846.95
Net Other Income	0.00	149,846.95
Net Income	-21,799.70	158,161.58



Furniture Share
Furniture to Families in Need

P.O. Box 2224, Corvallis, OR 97339, Phone: 541-754-9511, Fax: 541-738-0478, Michelle@furnitureshare.org, www.furnitureshare.org

Furniture Share Board Members 2022-23

John Origer, President Business Owner – Apex Property Clearing & Recycling (term expires 2021)	C: 541-905-6451 Toll free: 888-971-2739 apexpropertyclearing@gmail.com	3511 Bernard Ave. NE Albany, OR 97322
Gamael Nassar-Vice President Business Owner-Farmers Insurance (term expires 2021)	Office:541-926-7140 Cell: 561-440-4188 Fax: 541-981-5067 gnassar@farmersagent.com http://www.farmersagent.com/gnassar	909 Elm St SW Albany, OR 97321-2038
Debi Knutson Retired Accountant	541-619-1089 Deb122524@gmail.com	
Karley Campo Service Manager	Karleycampo@yahoo.com 541-971-7821	1335 Madison Street Albany, Oregon 97322
Will Tucker-Linn County Board Commissioner 25+ year's experience with marketing and community needs (term expires 2021)	O: 541-967-3825 Cell: 541-401-2323 wtucker@co.linn.or.us	Linn County Court House PO Box 100 Albany, Oregon 97321
Chelsea Mendenhall, Caregiver (term expires 2021)	C:541-981-9179	1599 Lehigh Way SE Albany, OR 97322
Meaghan Cole Sheet Metal Local 16	541-974-3174	2330 North Main Newberg, OR 97132

**Non-Discrimination and Affirmative Plan for United Way
 of Benton & Lincoln Counties, Oregon and Its Grantees**

It is the policy of all organizations that their operations are without discrimination as to race, color, religion, gender, mental/physical disability, age, national/ethnic origin, source of income, gender identity and sexual orientation. This policy applies to the hiring and promotion of staff, selection of volunteers and to persons served, except where the service provided is inherently designed to meet the needs of a particular group.

1. Operation without discrimination means the following:
 - A. No person is excluded from service, employment, or volunteering based on race, color religion, gender, mental/physical disability, age, national/ethnic origin, and sexual orientation.
 - B. There is no segregation of those served or employed.
 - C. Inter-racial understanding is promoted.
2. Let it be known that the Board of Directors of each organization affirms that each individual is entitled to equal employment opportunities without regard to race, color, religion, gender, mental/physical disability, age, national/ethnic origin, and sexual orientation; that equal employment opportunity extends to recruitment, hiring, promotion, transfers, training, compensation, layoff, termination, discipline, and all other conditions of employment. The Executive Director, chairperson, or person in charge of said organization shall be responsible for application of the equal employment policy of his/her organization.
3. To assure continual implementation of the above policy, the following Affirmative Action elements will be included:
 - A. Direct contact with the appropriate organizations in the community, including groups that serve the classes set forth above, regarding the agency's employment needs, recruitment, announcements or advertisements in publications that reach each of these groups as well as mass media; identifying the agency as an equal opportunity employer in recruitment or advertisements; and the use for job referral purposes of only those employment agencies that do not discriminate on the basis of race, color, religion, gender, mental/physical disability, age, national/ethnic origin, and sexual orientation in making referrals.
 - B. The nominating committee of the organization will annually review membership on the Board of Directors and will actively see representation from the full spectrum of the community, including the classes set forth above, for inclusion among their recommendations for election to the board.
4. All persons responsible for recruitment of the organization's volunteers and staff will be given a copy of this Non-Discrimination and Affirmative Action policy and will be expected to apply it.
5. The policy will be communicated internally to staff and externally through distribution to appropriate groups and will be incorporated into applicable promotional materials of the organization.
6. Any indication of noncompliance with the policy on the part of any United Way grantee will be called to the attention of the grantee. The grantee will then be expected to take immediate steps to achieve full compliance with this policy. Failure to remedy compliance deficiencies, in a timely manner, may result in the discontinuance of the offending organization as a grantee of the United Way of Benton & Lincoln Counties.



Request for Applications (RFA): Community Development Block Grant Activities

Applications Due by 5:00 p.m. Thursday, January 19, 2023 (PST)

333 Broadalbin Street SW, PO Box 490, Albany, Oregon 97321-0144 | Planning 541-917-7550

EXHIBIT A: APPLICATION

5.1 Applicant Information

Applicant (organization name): OCWCOG

Contact Person: Alicia Lucke Email: alucke@ocwcog.org

Mailing Address: 1400 Queen Ave SE, Albany, OR 97322

Phone #: 541-924-8440 Agency website: www.ocwcog.org

UEI #: 149704090 EIN: 93-0584306

Organization Mission Statement:

The Senior Companion Program's mission is meeting critical community needs while providing life-changing opportunities for seniors.

5.2 Proposal Summary

Activity/Program Name: Senior Companion Program

Activity Location: Albany, OR

Proposal Summary: *Provide a summary of the proposed activity and anticipated outcomes.*

The OCWCOG Senior Companion Program matches low-income seniors (200% FPL), ages 55 and older, with local City of Albany senior homebound residents. The Program provides assistance to those senior residents who have difficulty with activities of daily living, such as light housework, grocery shopping, or running errands. As a result, Program clients can remain in their own homes, independent and aging in place, instead of having to move to more costly institutional care. Senior Companions serve a minimum of five hours per week; the primary recipients are poverty-level individuals, ages 65+.

ACTIVITY BUDGET FOR WHICH CDBG FUNDS ARE BEING REQUESTED:

CDBG Funding Request	\$	4,800
Leveraged Funds/Resources	\$	48747
Total Activity Budget	\$	53547



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5.3 CDBG Application Narrative

Provide the information requested below **in a separate document** making sure the narrative corresponds to the numbers provided so the required information can be easily found to ensure a complete application. If the question does not apply to the proposed project write N/A.

Activity Description

1. Explain which priorities in Albany's 2023-2027 Consolidated Plan will be addressed by the activity.
2. Describe the community need that will be addressed by the proposed activity.
3. Explain how the activity is an effective strategy to address the identified gap in needs. Provide statistics or evidence to document the activity need.
4. Please specify which CDBG National Objective(s) will be satisfied by the proposed activity.
5. Explain how the project will promote inclusiveness and diversity. Include your agency's nondiscrimination policy for employees and clients as an attachment.
6. For faith-based organizations, explain how your agency will ensure CDBG funded activities are separate from explicitly religious activities such as worship, study of religious text, or evangelizing.

Benefit to low-income Albany residents

7. Who and how many will benefit from activity (estimate # of people, describe clients)?
8. Of these, how many are estimated to be extremely low-income (earning <30% of area median)? Is there any special emphasis on serving extremely low-income residents?

Scope of Work

9. Provide a **DRAFT SCOPE OF WORK** that outlines details about the proposed activity including all actions that will be taken to address the identified need and achieve anticipated performance measures and outcomes, and general accomplishments you intend to achieve with this activity.

Project Feasibility – Readiness to proceed

10. Please describe your readiness to proceed, whether land use or other issues are resolved and whether your organization has the administrative capacity to complete the proposed project. Describe the current organizational capacity to complete and manage the activity within the program year.
11. Please complete the schedule that follows or provide one that is applicable to the activity/project that outlines when major activities will be executed and when the project will be completed.

Organizational Capacity and Activity Sustainability

12. Describe experience and success conducting similar projects, use of federal or CDBG funds.
13. If any issues were raised during a federal program monitoring evaluation, please explain the findings and how issues were resolved.
14. Explain agency experience managing construction projects subject to Davis-Bacon and/or BOLI wage requirements and/or soliciting bids for construction projects.
15. Identify any other agencies or partners for this activity/project and define the roles and responsibilities of these partners.
16. Please explain how the agency embraces and demonstrates diversity within the organization.
17. If not fully funded, will the agency be able to pursue the activity/service (possibly at a reduced scale)?

Financial

18. Why are CDBG funds the best fit/source? Are there other sources of funding for this activity?



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5.4 Proposed Activity Budget

Provide the activity budget describing total cost, cost per task, existing (secured) project funds and unfunded costs. (DO NOT PROVIDE THE FULL AGENCY BUDGET HERE JUST THE ACTIVITY BUDGET.) Identify any and all source(s) of funding. This would include other Federal and State grants and loans, monetary donations, in-kind contributions, volunteer labor, donation of materials and supplies, etc. **Use the template provided below or your own as long as the same information is provided.**

Activity/Project Budget Summary (See 24 CFR 570 Subpart J)			
Estimated Total Cost of Activity:	\$ 53547		
CDBG Funding Requested for Activity:	\$ 4800		
Total Number of People/Households Served:	19		
Total Cost per Person/Household:	\$2818		
Total CDBG Cost per Person/Unit	\$253		
Describe Source of Other Funds:	Amount	Amount Secured	Amount Tentative
Federal:	46247	X	
State:			
Local:			
Donations/Private:			
Grants:	2500		X
Loans:			
Activity Budget Detail (Non-Development Activities)*projections based on FY23 OCWCOG budget			
Specific Cost Item/Description	CDBG Amount Requested	Other Funds Amount	Total Amount CDBG + Other Sources
Personnel/Fringe .10 FTE	\$ 2,500	\$16,220	\$18,720
Local Travel, Staff mileage, reim at federal rate	0	\$500	\$500
Tech Services, Licenses, Albany allocation	0	\$3,600	\$3,600
Albany Volunteer Stipend \$3.15/hr (\$4 April 1, 2023)	0	\$19,500	\$19,500
Volunteer Mileage, reim at .40/hour	\$2,300	\$500	\$2,800
Volunteer Training/Rec	0	\$6,427	\$6,427
Marketing/Ads-Radio (in kind)	\$0	\$2000	\$2000
Total	\$4.800	\$48,747	\$53,547



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5.5 Staff Experience and Qualifications

Identify the names of staff or contractors participating in the proposed program or activity, their role, experience they have in this role, their title, and the expected FTE on the project. **Include in an attachment resumes for key personnel anticipated to work on the proposed program, project, or activity.** Please make sure to identify the person responsible for collecting program performance data and preparing the quarterly reports for the City.

Employee	Experience and Qualifications
Name: Alicia Lucke Title: Program Manager FTE on This Project: 0.10	Ms. Lucke has over 11 years of volunteer management and training experience as the former Director of Cultural Health Initiatives at AZ American Heart Association. She holds a Master's Degree in development administrations with a focus on logic model design, planning and evaluation. She is responsible for the day to day operations of the Program to ensure regulation compliance, forecast recruitment strategies, and prepare quarterly reports.
Name: Title: FTE on This Project:	
Name: Title: FTE on This Project:	

5.3 CDBG Application Narrative

Activity Description

1. Explain which priorities in Albany's 2023-2027 Consolidated Plan will be addressed by the activity.

The OCWCOG Senior Companion Program- Albany project serves seniors 55+ that are at extremely-low to moderate-low income levels, as defined by HUD Income Limits. An estimated 90%+ of the volunteers and clients of this Program will meet the HUD income definitions; and, both volunteers and clients are further defined as "severely disabled adults" and/or "elderly persons". The relationship of the elderly volunteer to the elderly client is mutually beneficial and satisfies the City's 2023 -2027 plan as the program stipend *expands economic opportunity* for the senior volunteer who in turn provides *needed public services to both elderly and elderly persons with disabilities*.

2. Describe the community need that will be addressed by the proposed activity.

In the OCWCOG tri-county region, the population of adults between the ages of 60 and 74 years of age is predicted to increase from approximately 25,000 in 2000 to 45,000 in 2040. Services and supports for seniors that are not Medicaid eligible but in need of minor assistance with ADLs, that is, Activities of Daily Living as well as transportation (i.e. don't qualify for Rideline) are easily supplemented by the National Service of an AmeriCorps Seniors volunteer. The prevalence of disability in Linn County is 31.1% for residents aged 65 to 74 years, and 51.7% for residents over 75 years of age (Samaritan Albany General Hospital Community Health Needs Assessment 2023-2026).

3. Explain how the activity is an effective strategy to address the identified gap in needs. Provide statistics or evidence to document the activity need.

Housed within the OCWCOG Community Services Program the Senior Companion Program is well equipped to help fill LTSS gaps, in particular with those City of Albany residents who have extremely low (30% AMI) to moderate (80% AMI) income levels. A true "gaps" service, Senior Companions serve those LTSS clients who do not qualify for Rideline services; those who do not have the means to have private pay, or those that need one to two extra hours of extra help to age in place. AmeriCorps Seniors, the nation's leader in actively engaging older Americans, completed a longitudinal study which highlighted its impact on the social and health benefits of its active volunteers as well, making the Program one that is mutually beneficial. Comparing baseline scores with a second-year follow-up, **AmeriCorps Seniors volunteers were healthier**, less depressed, and less socially isolated than those who did not serve. As a result, 88% reported fewer feelings of isolation, **84% reported stable or improving health** and 78% reported fewer symptoms of depression

([https://www.nationalservice.gov/sites/default/files/evidenceexchange/Longitudinal Study of Foster Grandparent and Senior Companion Programs FINAL 508.pdf](https://www.nationalservice.gov/sites/default/files/evidenceexchange/Longitudinal%20Study%20of%20Foster%20Grandparent%20and%20Senior%20Companion%20Programs%20FINAL%20508.pdf)). A 2021 qualitative survey of Linn volunteers showed that **most use their supplemental stipend on groceries and prescriptions**, eating and taking medicines on a regular basis and thereby avoiding chronic disease; new this past year were also reports of the Program making seniors feel more connected during the ongoing COVID-19 pandemic. Senior Corps clients also benefit from chronic disease prevention and management thanks to National Service which makes it mutually beneficial and a cost-efficient investment.

4. Please specify which CDBG National Objective(s) will be satisfied by the proposed activity.

The Program, through its volunteer service activities, will satisfy NOC LMC, 24 CFR 570.208(a)(2).

5. Explain how the project will promote inclusiveness and diversity. Include your agency's nondiscrimination policy for employees and clients as an attachment.

Housed in the local Senior and Disability Services, OCWCOG is the region's expert on elder inclusiveness, elder care, elder justice, elder equitability and protection. Each Senior Companion referral "station" has both accessibility and prohibition of discrimination language in its partner MOUs. This Program purposefully seeks those older Albany residents on the fringe and connects them to supports in a cost-effective, meaningful way. Starting February 2021, thanks to a partnership with a local Disability Equity Center, all SCP volunteers will be trained on current DEI issues specifically affecting seniors as well as tangible ways to self-advocate in this space. OCWCOG offers Senior Companion Volunteers annual Implicit Bias Training, with the last training occurring on November 4, 2022, and the next training scheduled for early November 2023.

6. For faith-based organizations, explain how your agency will ensure CDBG funded activities are separate from explicitly religious activities such as worship, study of religious text, or evangelizing.

N/A

Benefit to low-income Albany residents

7. Who and how many will benefit from activity (estimate # of people, describe clients)?

20 total City residents; 6 volunteers and 14 clients; we estimate that a minimum of 1/2 will be extremely low income at 0-30% AMI. We estimate that the vast majority of total clients served will report 0- 50% AMI.

8. Of these, how many are estimated to be extremely low-income (earning <30% of area median)? Is there any special emphasis on serving extremely low-income residents?

Please see answer re: extremely low-income in Question 6. Yes, there is an emphasis on extreme poverty in all of the Senior Companion Programs as its foundation was born from demonstration grants during Johnson's war on poverty. As indicated above, all volunteers are at 200%FPL which is verified on an annual basis. The vast majority of volunteers, due to the 200% FPL standard, meet the 0-30% AMI criterion.

Scope of Work

9. Provide a **DRAFT SCOPE OF WORK** that outlines details about the proposed activity including all actions that will be taken to address the identified need and achieve anticipated performance measures and outcomes, and general accomplishments you intend to achieve with this activity.

Five Senior Companion volunteers, residents of the City, will serve fourteen City of Albany elderly homebound neighbors in need of companionship and transportation. OCWCOG Senior Companion volunteers will receive specialized training in OCWCOG services by SDS staff, as well as instruction in self-care management, compassion fatigue, respite services, defensive driving, financial coaching and cultural competency. Each volunteer must pass both the agency's Area Agency on Aging and federal background checks, which includes a FBI fingerprint screening. Each volunteer will serve 5+ hours per week with a qualitative Independent Living Survey conducted once the federal activity dosage is met.

Drivers practice NEMT protocol for physical distancing while meeting the transportation needs of their clients.

Project Feasibility – Readiness to proceed

10. Please describe your readiness to proceed, whether land use or other issues are resolved and whether your organization has the administrative capacity to complete the proposed project. Describe the current organizational capacity to complete and manage the activity within the program year.

This project is ongoing and part of a three year federal award; OCWCOG has federal mandated FTE and staffing in place to manage those funds already allocated for FY23-24 (current grant cycle is July 1, 2021- June 30, 2024).

11. Please complete the schedule that follows or provide one that is applicable to the activity/project that outlines when major activities will be executed and when the project will be completed.

July-September: Historically have received delayed CDBG funds; therefore, we typically do not budget for CDBG in Quarter 1 due to this delay. Volunteers and clients are matched; any mileage for service activities are typically covered by other funding. We use this time to send out Client Self-Surveys and collect information for the CDBG metrics. PPE distributed, if needed; NEMT policies reviewed if pandemic continue to ensure proper COVID protocols are met. Mileage collected, processed and reviewed monthly.

Oct-Dec: Home visits and check ins with Albany-based volunteers and clients; Care Plans reviewed. Address any gaps in metrics needed. Mileage collected, processed and reviewed monthly.

Jan-June: Mileage collected, processed and reviewed monthly, monthly in-service trainings to triage client needs with volunteers and randomized care plan reviews.

July: Aggregate data, Final Report submitted.

Organizational Capacity and Activity Sustainability

Organizational Capacity and Activity Sustainability

12. Describe experience and success conducting similar projects, use of federal or CDBG funds.

This is the 6th application for CDBG funds to support the OCWCOG Senior Companion Program which is a federal program under the Corporation of National and Community Services. As such, OCWCOG is well versed on federal regulations in both pre and post award stages to include MOU development and evaluation, performance measures outputs and outcomes, volunteer mileage policies and financial management courses to include FFR preparation training.

13. If any issues were raised during a federal program monitoring evaluation, please explain the findings and how issues were resolved.

The OCWCOG Senior Corps Programs have undergone random federal audits during the last four fiscal years as well as routine federal monitoring reviews; they have had no findings during these audits. In addition, OCWCOG is the only federal sponsor in the State to host all three Senior Corps Programs under its umbrella and its staff routinely serve as field "trainers" for new Directors. The OCWCOG is eager to continue its track record of finding the balance of adhering to CNCS' policies and regulations while keeping National Service innovative and responsive to changing community needs in the City.

14. Explain agency experience managing construction projects subject to Davis-Bacon and/or BOLI wage requirements and/or soliciting bids for construction projects.

N/A

15. Identify any other agencies or partners for this activity/project and define the roles and responsibilities of these partners.

Aging and Disability Resource Connection (ADRC): Specialist triage incoming calls from prospective clients; refers to OPI; OPI Case Managers: Conduct home visit with client, reviews options based on ADLs and income.

MOU Partners:

OCWCOG, Senior and Disability Services Department OCWCOG, Meals on Wheels Program

OCWCOG, Money Management Program

16. Please explain how the agency embraces and demonstrates diversity within the organization.

In the addition the aforementioned activity descriptions found in question 5, Senior Companion volunteers receive cultural competency training at least once during the project cycle. Program Manager Alicia Lucke is a trained Spanish linguist and provides interpreted and translation of AmeriCorps Seniors assignments as requested. The OCWCOG also has a new DEI Committee within the agency, a combination of management and union employees; and, is also convening communities for input on a Bias Response system and/or supports for the Linn-Benton-Lincoln region.

17. If not fully funded, will the agency be able to pursue the activity/service (possibly at a reduced scale)?

Yes, the agency would be able to pursue activity but would have to adjust mileage caps and staff project management time to the Albany project.

Financial

18. Why are CDBG funds the best fit/source? Are there other sources of funding for this activity?

CDBG funds are a good source of funding to supplement our baseline award; our highest call volume comes from the City of Albany and it makes sense to focus our efforts to serving where there is greatest demand. We have no other funds specifically earmarked for City residents' mileage reimbursements (.40/mile) with the exception of local grant funds historically given by Samaritan Albany General Hospital who also supports this Program through its Social Accountability funds.

ALICIA M. LUCKE

6206 SW Grand Oaks Drive, Corvallis, OR 97333 541.609.8073 alicia.lucke@gmail.com

PROFESSIONAL SUMMARY: Bilingual project administrator with over ten years' experience managing federal, state and local grants and contracts. Demonstrated success in grant writing and program implementation and evaluation, including federal regulation compliance. Strong public speaking, teaching and coaching skills; near-native fluency in Spanish. United States Government certified trainer in Adult Learning Strategies and Adult Learning Curriculum Development. Proficient in Microsoft Applications, Donor Perfect, Liquid Planner, STARS and e-Grants systems.

PROFESSIONAL EXPERIENCE

PROGRAM SUPERVISOR, AMERICORPS SENIORS PROGRAMS, Oregon Cascades West Council of Governments, Albany, Oregon, 2014-present.

Plans, organizes, and implements recruitment, screening, orientation, onboarding and placement of 400 senior volunteers in Linn, Benton and Lincoln Counties;

Approves assignment of Older American volunteers to appropriate community stations. Develops and maintains cooperative working relations with a variety of community service organizations and agencies;

Develops, organizes, and implements fundraising efforts in order to support the fiscal needs of the program;

Applies for, and manages, a variety of local, state and federal grants. Monitors program budget and applies sound fiscal procedures. Develops and maintains up-to-date financials, program deliverables and data tracking reports to include longitudinal surveys;

Acts as the liaison between OCWCOG and federal contract. Assists with interpretation of state and federal policies that translate into operational activities;

Makes presentations and serves as lead program media contact for local funders, radio and print interviews;

Maintains and effectively supervises two staff and forty-five low-income stipend senior volunteers, including forecasting and monitoring of project managed hours, volunteer timesheets, PTO stipend accruals, volunteer insurance claims, training, performance evaluations and disciplinary appeals; and

Proactively seeks and supervises a variety of internships from local universities.

SPANISH TRAINING SPECIALIST II, General Dynamics Information Technology 2008-2013; A. Harold and Associates 2012-2013, Federal Law Enforcement Training Center, Glynco, GA.

- Conducted 8,200+ hours of Spanish vocabulary, grammar and culture training at the Interagency Language Roundtable (ILR) 1+ level;
- Advised and tutored approximately 700 adult learners in preparation for end-of-course Formal Presentations including special purpose vocabulary, slang, Latino cultural competency and awareness;
- Obtained favorable U.S. Government background security clearance for access to ADP systems;
- Designated Train-the-Trainer for new hire orientations with both contractors (General Dynamics and A. Harold and Associates); and
- Served as Curriculum Advisor for Spanish vocabulary and culture sections of the U.S. Government Department of Homeland Security's Language Academy (2011-2013).

CULTURAL HEALTH DIRECTOR, American Heart Association/Pacific Mountain Affiliate. Tempe, AZ. 2006-2008.

- Recruited, coordinated and managed the American Heart Association's Cultural Health Initiatives group comprised of minority community leaders in the Phoenix and Denver markets;
- Served as bilingual spokesperson for State of Arizona Health Department's Cardiovascular Group;
- Managed local matching grants to include American Heart Association/United Way partnership focused on elder health outreach;
- Created, implemented and monitored grassroots hypertension awareness programs within the Phoenix African-American, Latino and Somali populations; and
- Received the 2008 Power to End Stroke Phoenix Community Leader designation.

RESEARCH ASSISTANT, Western Michigan University's Department of Political Science, Kalamazoo, MI. 2004- 2006.

- Assisted in the research, planning and delivery of three undergraduate Political Science courses: PSCI 375 Latin American Politics, PSCI 344 Women in Developing Countries, and PSCI 200 American Government.

EDUCATION

UNIVERSITY OF NORTH FLORIDA, Jacksonville, FL. 3 Graduate Spanish Credits, December 2011. GPA: 4.0/4.0.

WESTERN MICHIGAN UNIVERSITY, Kalamazoo, MI.

M.D.A, Master of Development Administration, April 2006. Emphasis on project monitoring and evaluation; logic model design and qualitative methods. Graduate Research Fellow for the Department of Political Science, GPA: 3.82/4.0.

B.A., Spanish, International and Comparative Politics and Communications, April 2004. Graduated with Honors in Political Science. GPA: 3.67/4.0.

STUDY ABROAD PROGRAMS:

UNIVERSIDAD AUTÓNOMA DE QUERÉTARO, México: 2003

UNIVERSIDAD DE BURGOS, Spain: 2001

PROFESSIONAL AFFILIATIONS

Club Member – Kiwanis Club of Lincoln City, 2017- present.

Executive Board Member, National Senior Corps Association, 2017-present.

Data and Evaluation Workgroup – Early Learning Hub of Linn, Benton and Lincoln Counties, 2017-present.

Executive Board Member – Seniors Serving Oregon Coalition, 2015- present.

Board Member: Centro de Ayuda, Newport, 2015-2016.

VOLUNTEER ROLES

Board Vice President – Philomath Community Services, 2016-2017, Governance Committee 2017-2018.



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Applications Due by 5:00 p.m. Thursday, January 19, 2023

333 Broadalbin Street SW, Albany, Oregon 97321-0144 | BUILDING 541-917-7553 | PLANNING 541-917-7550

Exhibit B: REQUIRED CDBG CERTIFICATIONS

If this agency (name): Oregon Cascades West COG is awarded funding, the agency agrees that:

1. The recipient has a DUNS # and is or will be registered in the U.S. System for Award Management at <http://sam.gov> before contract award and will update registration as necessary.
2. The recipient will provide liability insurance coverage as required by the City of Albany, and worker's compensation and payment of payroll taxes as required by Federal and State laws.
3. All expenditures must have adequate documentation and all accounting records and supporting documentation shall be available for inspection by City of Albany upon request, and funds will not be used to provide services/assistance for the same costs/losses from other funding sources.
4. All procurement (purchase) transactions regardless of whether negotiated or advertised and without regard to dollar value shall be conducted in a manner to provide maximum open free competition.
5. Financial records, support documentation, statistical records, and all other records pertinent to funding shall be retained for a period of ten years following completion of project/activity.
6. The recipient shall establish safeguards to prohibit employees from using their positions for a purpose that has the appearance of being motivated by a desire for private gain for themselves or others.
7. All materials submitted shall become public records retained by the City of Albany, except that late applications will be returned to the applicant without further review.
8. No person, on the basis of race, color, national origin, sex, gender identity, familial status, religion, disability, age, veteran status, or any other characteristic protected under applicable federal, state, or local laws should be excluded from participation in, be denied the benefit of, or be otherwise subjected to discrimination under the program or activity funded in whole or part by CDBG funds. The funding recipient agrees to furnish copies of applicable policies and procedures upon request.
9. Employment made by or resulting from CDBG funding from the City of Albany shall not discriminate against any employee or applicant on the basis of disability, age, race, color, religion, sex, or national origin.
10. None of the funds, materials, property, or services provided directly or indirectly under CDBG funding from the City of Albany shall be used for any partisan political activity, or to further the election or defeat of any candidate for public office.
11. Letter of commitment from other funding sources and/or letters of support for your project shall be furnished to the City of Albany upon request.
12. **Authorization to request funds:** I acknowledge the statements above and certify the information contained in this application is true and correct. I further understand material omission or false information contained in this application constitutes grounds for disqualification.

Signature

Ryan Vogt, Executive Director

Printed Name and Title

Jan 5, 2023

Date



Request for Applications (RFA): Community Development Block Grant Activities

Applications Due by 5:00 p.m. Thursday, January 19, 2023 (PST)

333 Broadalbin Street SW, PO Box 490, Albany, Oregon 97321-0144 | Planning 541-917-7550

Exhibit C: CONFLICT OF INTEREST CERTIFICATION

Applicant has no conflict of interests with any City of Albany appointed or elected representatives and does not employ City appointed or elected representatives or their families.

Conflict of Interest. The undersigned Applicant and each person signing on behalf of the Applicant certifies, and in the case of a sole proprietorship, partnership, or corporation, each party thereto certifies as to its own organization, under penalty of perjury, that to the best of their knowledge and belief, no member of the City Council, officer, employee, or person, whose salary is payable in whole or in part by the City, has a direct or indirect financial interest in the award of funds, or in the services to which this Application relates, or in any of the profits, real or potential, thereof, except as noted otherwise herein. The undersigned hereby submits this Application to furnish all services and activities as indicated in the Application submittal.

Furthermore, Applicant must disclose any real or perceived conflict of interest, current or past relationships with City of Albany employees, appointed or elected officials associated with this program.

Disclosure: _____

SIGNATURE OF AUTHORIZED PERSON:

(notarization is not required)

The Applicant hereby certifies that the information contained in these certifications and representations is accurate, complete, and current.

Oregon Cascades West Council Of Governments

541-924-8465

Applicant's Agency Name

Phone Number

Signature

Jan 5, 2023

Date

Ryan Vogt, Executive Director

Printed Name and Title

Section 3 Business or Individual *(check applicable box):*

☐ Yes ☒ No

Disadvantaged, Minority, Emerging Small Business (DMESB) *(check applicable box):*

☐ Yes ☒ No



Request for Applications (RFA): Community Development Block Grant Activities

Applications Due by 5:00 p.m. Thursday, January 19, 2023

333 Broadalbin Street SW, Albany, Oregon 97321-0144 | BUILDING 541-917-7553 | PLANNING 541-917-7550

Exhibit D: ANTI-LOBBYING STATEMENT

The anti-lobbying provisions will apply to any person who is an employee, agent, consultant, officer, elected or appointed official of the subrecipient that is receiving CDBG or CDBG-CV funds.

Applicant certifies that:

1. No Federal funds have been paid or will be paid, by or on behalf of the applicant agency, to any person for influencing or attempting to influence an officer or employee of the awarding of any Federal, state or municipal contract, the making of any Federal or municipal grant, the making of any Federal or municipal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment or modification of any Federal, state or municipal contract, grant, loan or cooperative agreement.
2. If any funds other than Federal funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any Federal or municipal agency/department, Member of Congress, an officer or employee of Congress, an employee of a Member of Congress, Mayor, City Council member, or employee of the Mayor or a City Council member in connection with this application, contract, grant, loan or cooperative agreement, it will complete and submit Standard Form-LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions; and
3. It will require that the language of paragraph 1 and 2 of this anti-lobbying certification be included in the award documents for all subcontractor awards at all tiers.

SIGNATURE OF AUTHORIZED PERSON:

(notarization is not required)

A handwritten signature in black ink, appearing to be "R. L.", written over a horizontal line.

Signature

Jan 5, 2023

Date



Request for Applications (RFA): Community Development Block Grant Activities

Applications Due by 5:00 p.m. Thursday, January 19, 2023

333 Broadalbin Street SW, Albany, Oregon 97321-0144 | BUILDING 541-917-7553 | PLANNING 541-917-7550

EXHIBIT E - APPLICANT REPRESENTATIONS AND CERTIFICATION REGARDING DEBARMENT, SUSPENSION AND OTHER RESPONSIBILITIES

The Applicant certifies to the best of its knowledge and belief by initialing next to each statement that neither it nor any of its principals:

1. ____ Are presently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from submitting bids or Applications by and federal, state or local entity, department or agency;
2. ____ Have within a five-year period preceding the date of this certification been convicted of fraud or any other criminal offense in connection with obtaining, attempting to obtain, or performing a public (federal, state, or local) contract embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
3. ____ Are presently indicted for or otherwise criminally charged with commission of any of the offenses enumerated in Paragraph 2 of this certification;
4. ____ Have, within a five-year period preceding the date of this certification had a judgment entered against contractor or its principals arising out of the performance of a public or private contract;
5. ____ Have pending in any state or federal court any litigation in which there is a claim against applicant or any of its principals arising out of the performance of a public or private contract; and
6. ____ Have within a five-year period preceding the date of this certification had one or more public contracts (federal, state, or local) terminated for any reason related to contract performance or compliance.

If Applicant is unable to attest to any of the statements in this certification, Applicant shall attach an explanation to the Application. The inability to certify to all of the statements may not necessarily preclude the Applicant from award of a contract under this procurement.

SIGNATURE OF AUTHORIZED PERSON:

(notarization is not required)

Signature

Jan 5, 2023

Date

EXHIBIT F – CERTIFICATION OF INSURANCE REQUIREMENTS

All Subrecipients shall at all times maintain insurance in the coverage limits noted below at Applicant's expense.

Preferred limits below may be adjusted on a case by case basis.

Workers' Compensation insurance in compliance with ORS 656.017, which requires subject employers to provide workers' compensation coverage in accordance with ORS Chapter 656 or CCB (Construction Contractors Board) for all subject workers. Contractor and all subcontractors of Contractor with one or more employees must have this insurance unless exempt under ORS 656.027. **Employer's Liability Insurance with coverage limits of not less than \$1,000,000 must be included. If Contractor does not have coverage, and claims to be exempt, Contractor must indicate exemption below with qualified reasons for exemption, ORS 656.027.** Out-of-state Contractors with one or more employees working in Oregon in relation to this Contract must have Workers' Compensation coverage from a state with extraterritorial reciprocity, or they must obtain Oregon specific Workers' Compensation coverage ORS 656.126. ☐ Check this box if Contractor is exempt and provide qualified reason: _____

Professional Liability insurance covering any damages caused by error, omission or any negligent acts of the Contractor, its subcontractors, agents, officers, or employees' performance under this Contract. **Combined single limit per occurrence shall not be less than \$2,000,000. Annual aggregate limit shall not be less than \$2,000,000.** If coverage is on a claims-made basis, then either an extended reporting period of not less than 24 months shall be included in the Professional Liability insurance coverage, or Contractor shall provide **Tail Coverage**.

- ☐ If this box is checked, the limits shall be \$1,000,000 per occurrence and \$1,000,000 in annual aggregate.
☐ Required by City ☒ Not Required by City (Needs Finance Insurance Review and Approval.)

Commercial General Liability insurance with coverage satisfactory to the City on an occurrence basis. **Combined single limit shall not be less than \$2,000,000 per occurrence for Bodily Injury and Property Damage and annual aggregate limit for each shall not be less than \$3,000,000.** Coverage may be written in combination with Automobile Liability Insurance (with separate limits). **Annual aggregate must be on a "per project basis".** A combination of primary and **Excess/Umbrella insurance** may be used to meet the required limits of insurance.

- ☐ If this box is checked, the limits shall be \$1,000,000 per occurrence and \$2,000,000 in annual aggregate.
☐ If this box is checked, the limits shall be \$5,000,000 per occurrence and \$5,000,000 in annual aggregate.
☒ Required by City ☐ Not Required by City (Needs Finance Insurance Review and Approval.)

Automobile Liability covering all owned, non-owned, or hired vehicles. This coverage may be written in combination with the Commercial General Liability insurance (with separate limits). **Combined single limit per occurrence shall not be less than \$2,000,000.** Use of personal automobile liability insurance coverage may be acceptable if evidence that the policy includes a business use endorsement is provided.

- ☐ If this box is checked, the limits shall be \$1,000,000 per occurrence.
☐ If this box is checked, the limits shall be \$5,000,000 per occurrence.
☒ Required by City ☐ Not Required by City (Needs Finance Insurance Review and Approval.)

Pollution Liability covering Contractor's or appropriate subcontractor's liability for bodily injury, property damage and environmental damage resulting from sudden accidental and gradual pollution and related cleanup costs incurred by Contractor, all arising out of the Goods delivered or Services (including transportation risk) performed under this Contract is required. If this coverage is on a claims-made basis, the policy must provide a 24-month extended reporting period. **Coverage must have a limit of not less than \$2,000,000 per incident/claim and \$2,000,000 policy annual aggregate.**

- ☐ Required by City ☒ Not Required by City (Needs Finance Insurance Review and Approval.)

Sexual Abuse and Molestation for the duration of the contract and for the period of time in which Contractor is providing business services. **Coverage must include limits of not less than \$1,000,000.**

☐ Required by City ☒ Not Required by City (Needs Finance Insurance Review and Approval.)

Coverage must be provided by an insurance company authorized to do business in Oregon or rated by A.M. Best's Insurance Rating of no less than A-VII or City approval. Contractor's coverage will be primary in the event of loss and state the deductible or retention level. Contractor shall provide a current Certificate of Insurance and renewal upon expiration of any of the required coverages. Contractor shall immediately notify the City of any change in insurance coverages.


Additional Insured - the City must be listed as an Additional Insured by endorsement for any General Liability policy on a primary and non-contributory basis. Such coverage will specifically include products and completed operations coverage.

Description of Operations shall state: "Project Name: The City of Albany, its officers, employees and agents are additional insureds with respect to Contractor's activities to be performed under this Contract. Coverage shall be primary and non-contributory with any other insurance and self-insurance, (include the number). This form is subject to policy terms, conditions and exclusions."

A copy of the endorsement shall be attached to the Certificate of Liability Insurance. Contractor shall provide complete copies of insurance policies if requested by the City.

Certificate holder shall be listed as: City of Albany, P.O. Box 490, Albany, OR 97321. Certificates of Insurance may be emailed to City of Albany, Finance Dept., Diane Murzynski, at insurance@cityofalbany.net.

Signature Block:

Applicant's Acceptance:  _____

Date: Jan 5, 2023

Company Name: Oregon Cascades West Council Of Governments



Request for Applications (RFA): Community Development Block Grant Activities

Applications Due by 5:00 p.m. Thursday, January 19, 2023

333 Broadalbin Street SW, Albany, Oregon 97321-0144 | BUILDING 541-917-7553 | PLANNING 541-917-7550

Exhibit G: RELIGIOUS/FAITH-BASED ORGANIZATION CERTIFICATION

If the agency is or represents that it is, or may be deemed to be, a religious or denominational institution or organization or an organization operated for religious purposes. The agency agrees that, in connection with such community development activities and operational costs:

1. It will not discriminate against any persons seeking CDBG-funded services and/or related services on the basis of religion or religious belief; and
2. It will not use CDBG funds to support any inherently religious activities, such as worship, religious instruction, or proselytization.

The agency/subrecipient is NOT a religious organization.

Signature

Jan 5, 2023

Date

Ryan Vogt, Executive Director

Printed Name and Title

Oregon Cascades West COG

Agency Name

The agency/subrecipient IS a religious or faith-based organization and agree to follow terms above.

Signature

Date

Printed Name and Title

Agency Name

Oregon Cascades West Council of Governments

Community Service Programs

Consolidated Budget FY 2022-23

2019-2020 Actuals	2020-21 Actuals	2021-22 Adopted	Estimated Actuals	Description	FTE	2022-23 Proposed	RSVP	Veterans	Meals on Wheels	OPI-OAA	Stand By Me (to 309)	Special Contracts & Grants	Meals Reserve
7,764	49,944	38,029	0	Beg Bal-Restricted for Grants		66,956	66,956	0	0	0	0	0	0
622,184	493,518	445,942	452,106	Beg Bal-Restrict for Contracts		136,788	15,000	14,476	0	0	0	107,312	0
61,390	260,396	912,305	739,931	Beg Bal-Restricted for Other		435,355	0	0	358,522	0	0	0	76,833
		175,000	158,000	Beg Bal-Restricted for Reserves		0	0	0	0	0	0	0	0
104,306	309,252	416,420	23,404	Beg Bal-Unrestricted		437,867	0	41,896	0	395,971	0	0	0
36,126	38,710	32,000	23,886	Fee for Service		36,500	500	0	0	21,000	0	0	15,000
5,182	4,322	5,000	465	Internal Transfer		5,000	0	0	0	0	0	0	5,000
209	651	0	0	Miscellaneous Revenue		0	0	0	0	0	0	0	0
1,610,054	948,074	1,187,063	827,296	Contract Revenue		1,080,069	510,563	207,500	0	0	0	362,006	0
168,724	160,730	175,720	139,492	Grant Revenue		265,494	48,000	9,000	125,000	0	0	83,494	0
230,379	233,726	250,500	153,944	Donations		200,500	500	0	200,000	0	0	0	0
17	18	0	12	Interest Revenue		0	0	0	0	0	0	0	0
25,000	0	0	0	Transfer In		0	0	0	0	0	0	0	0
18,167	0	0	0	Special Event Revenue		0	0	0	0	0	0	0	0
181,463	177,173	160,000	218,024	Program Meals Revenue		160,000	0	0	160,000	0	0	0	0
0	0	0	0	Program Income		0	0	0	0	0	0	0	0
47,064	47,066	48,000	35,940	Match Revenue		35,600	35,600	0	0	0	0	0	0
112,687	100,992	113,684	114,489	Veterans		114,000	0	114,000	0	0	0	0	0
1,116,855	1,089,454	990,000	872,771	Oregon Project Independence		1,045,000	0	0	145,000	900,000	0	0	0
1,413,310	1,842,266	1,300,000	1,047,196	Older American Act		1,223,000	0	0	700,000	523,000	0	0	0
134,911	130,648	120,000	130,081	Title XIX		140,000	0	0	140,000	0	0	0	0
641,285	738,404	800,000	645,000	Senior Meals XIX		650,000	0	0	650,000	0	0	0	0
107,065	83,377	95,000	94,377	USDA		95,000	0	0	95,000	0	0	0	0
57,828	1,756	20,000	10,348	Federal Match		40,000	0	40,000	0	0	0	0	0
9,861	7,098	8,000	10,178	Siletz Revenue		10,000	0	0	10,000	0	0	0	0
6,711,831	6,717,575	7,292,663	5,696,941	REVENUE		6,177,129	677,119	426,872	2,583,522	1,839,971	0	552,812	96,833
75,100	70,144	75,013	68,436	Leave Expense		85,868	11,303	9,031	24,660	31,329	0	9,545	0

131,353	105,718	135,649	103,413	Fringe Benefits	124,022	16,175	15,616	39,678	37,738	0	14,815	0
385,496	334,899	407,752	334,146	Insurance Benefits	450,556	44,870	63,222	142,434	133,242	0	66,788	0
307,948	276,910	337,075	309,262	PERS Benefits	367,036	49,261	47,560	110,160	114,934	0	45,121	0
11,996	10,348	25,370	10,988	PERS Reserve	28,250	3,684	3,557	9,038	8,596	0	3,375	0
19,239	47,044	43,737	0	Program Director	0	0	0	0	0	0	0	0
57,059	0	0	0	Services Director	0	0	0	0	0	0	0	0
0	28,335	89,267	86,975	Program Manager	1.00	25,402	5,080	5,080	30,482	0	10,161	0
134,654	74,322	45,959	39,222	Program Supervisor	2.00	149,509	0	64,844	84,665	0	0	0
73,659	54,380	0	0	RSVP Supervisor	0	0	0	0	0	0	0	0
86,901	101,597	78,401	2,986	Administrative Assistant	1.73	66,082	13,676	0	11,722	0	0	0
74,490	68,700	85,500	0	ADRC Specialist	1.50	78,340	0	0	78,340	0	0	0
298,608	164,835	209,573	153,924	Case Manager	3.00	204,795	0	0	187,621	0	17,174	0
0	0	0	0	Clerical Assistant	0	0	0	0	0	0	0	0
54,584	60,084	19,625	63,688	Clerical Specialist	2.00	87,485	0	45,834	0	0	41,651	0
22,425	10,818	15,264	17,294	Contracts Coordinator	0.00	0	0	0	0	0	0	0
132,434	84,206	190,004	156,464	Eligibility Specialist	4.00	220,736	102,599	0	0	0	0	0
0	24,046	0	25,462	Executive Assistant	0.50	27,664	0	0	27,664	0	0	0
0	0	0	0	STEPS Elig Specialist	1.00	62,165	0	0	9,325	0	52,840	0
1,146	0	0	0	In Home Assistant	0.00	0	0	0	0	0	0	0
0	0	26,532	8,657	Lead Case Manager	0.00	0	0	0	0	0	0	0
49,854	7,847	57,080	121,810	Lead Eligibility Specialist	0.00	0	0	0	0	0	0	0
32,032	46,548	50,478	42,222	Money Management Coordinator	1.00	46,914	0	0	0	0	46,914	0
0	0	0	0	Meal Site Manager 1	3.90	155,503	0	155,503	0	0	0	0
194,774	193,432	194,502	201,872	Meal Site Manager 3	2.20	96,187	0	96,187	0	0	0	0
14,462	12,821	25,000	20,357	Relief Site Manager	1.40	39,940	0	39,940	0	0	0	0
0	8,919	48,165	54,313	Senior Meals Supervisor	0	0	0	0	0	0	0	0
35,948	37,454	40,885	40,287	Senior Meals Coordinator	1.00	44,520	0	44,520	0	0	0	0
0	0	0	0	Technology Support Spec.	0	0	0	0	0	0	0	0
7,903	0	0	0	Workstation Support Specialist	0	0	0	0	0	0	0	0
35,308	52,773	44,634	52,610	Veterans Service Officer	1.00	56,505	56,505	0	0	0	0	0
5,695	0	0	0	Extra Hire	0	0	0	0	0	0	0	0
2,243,071	1,876,180	2,245,465	1,914,387	PERSONNEL	2,468,282	309,516	316,846	777,878	755,658	0	308,384	0
5,820	22,954	9,600	21,031	Advertising	15,195	10,000	1,000	2,000	1,195	0	1,000	0
18,207	15,255	17,000	2,224	Auto Expense	17,000	0	0	12,000	0	0	0	5,000
727	702	875	964	Bank Charges.	0	0	0	0	0	0	0	0
1,528	60	1,250	456	Board/Comm/Meeting Expense	1,200	500	200	300	0	0	200	0
7,441	5,919	20,200	12,426	Computer Maint./Equipment	16,900	2,500	2,400	2,400	7,200	0	2,400	0
1,751,984	1,831,191	1,690,000	1,528,762	Contract Expense	1,804,100	3,600	500	1,500,000	230,000	0	70,000	0

539,704	651,847	500,000	454,548	CEP Contract		600,000	0	0	0	600,000	0	0	0
7,898	5,790	9,700	2,585	Copying		9,000	3,000	1,000	2,500	2,000	0	500	0
6,695	1,280	2,300	1,890	Dues and Memberships		2,900	1,000	500	1,200	0	0	200	0
99,089	44,450	95,041	91,987	Finance Indirect		133,099	17,499	16,619	51,568	31,772	0	15,641	0
202,010	93,869	200,398	193,960	Indirect Expense		189,888	24,965	23,710	73,570	45,328	0	22,315	0
1,170	567	0	0	Furniture & Fixtures		500	500	0	0	0	0	0	0
2,438	2,718	3,763	3,023	Insurance		5,200	4,000	0	1,000	0	0	200	0
0	191	0	0	Legal Expenses		2,000	500	1,000	500	0	0	0	0
8,752	14,502	29,650	22,127	Licenses and Fees		60,500	6,500	7,500	20,000	1,500	0	25,000	0
16,512	15,944	23,500	9,648	Maintenance and Repair		21,000	1,000	0	5,000	0	0	0	15,000
0	0	0	0	Marketing Expense		0	0		0	0	0	0	0
5,568	3,533	4,650	5,768	Postage		6,300	2,500	350	2,200	500	0	750	0
6,528	3,983	9,000	6,554	Printing		10,500	4,000	500	5,000	500	0	500	0
106,357	90,184	109,131	101,561	Rent		73,182	14,940	13,607	17,912	20,877	0	5,846	0
2,572	2,573	2,800	3,060	Janitorial Expense		3,100	0	3,100	0	0	0	0	0
49,976	59,914	27,900	13,578	Supplies		14,000	6,000	1,000	0	6,500	0	500	0
124,996	156,356	144,072	103,887	Stipend		137,808	137,808	0	0	0	0	0	0
138,727	98,030	134,801	130,470	Technology Indirect		148,471	19,520	18,538	57,524	35,441	0	17,448	0
27,817	22,760	29,857	23,507	Telephone		29,700	3,000	3,200	16,000	4,500	0	3,000	0
0	0	0	0	Special Event		0	0	0	0	0	0	0	0
8,724	3,424	20,900	8,101	Training		24,000	12,000	5,000	3,000	2,000	0	2,000	0
14,126	33,793	20,500	17,708	Volunteer Recognition		23,970	20,000	0	3,970	0	0	0	0
18,363	18,483	18,000	13,235	Meal Delivery Travel		18,000	0	0	18,000	0	0	0	0
36,839	5,338	50,000	20,762	Volunteer Travel		35,000	35,000	0	0	0	0	0	0
36,467	9,246	25,500	15,931	Travel		30,500	5,000	3,000	10,000	10,000	0	2,500	0
0	0	218,000	0	Capital Purchase		0	0	0	0	0	0	0	0
0	0	0	0	Transfers Out		0	0	0	0	0	0	0	0
857,634	0	1,207,202	0	Operating Contingency		275,834	32,271	7,302	0	85,000	0	74,428	76,833
4,104,670	3,214,857	4,625,590	2,809,753	MATERIALS AND SUPPLIES		3,708,847	367,603	110,026	1,805,644	1,084,313	0	244,428	96,833
6,347,741	5,091,037	6,871,055	4,724,140	TOTAL EXPENSES		6,177,129	677,119	426,872	2,583,522	1,839,971	0	552,812	96,833
364,090	1,626,538	421,608	972,801	Unappropriated Ending Balance		0	0	0	0	0	0	0	0

CSP RSVP FINANCIAL STATEMENT

SEPTEMBER 2022

Monthly Financial Reports

Printed: 10/20/2022 3:49:56 PM

Period 03 - 03

Fiscal Year 2023

Fund	Dept	Account Number	Description	Budget	Beg Bal	Period Amt	End Bal	% Of Budget
1035	302	000710	Beg Bal-Restricted for Grants	\$	(15,000.00)	\$	\$	-
1035	302	000725	Beg Bal-Restrict for Contracts	\$	(66,956.00)	\$	\$	-
1035	302	000802	Fees For Service	\$	(500.00)	\$	\$	-
1035	302	000806	Grant Revenue	\$	(48,000.00)	(31,447.10)	\$	(34,472.12) 71.82%
1035	302	000807	Donations	\$	(500.00)	\$	\$	-
1035	302	000808	Interest Revenue	\$	-	(1.40)	\$	(4.36) 0.00%
1035	302	000805	Contract Revenue	\$	(510,563.00)	\$	\$	-
1035	302	000824	Match	\$	(35,600.00)	(5,275.00)	\$	(10,275.00) 28.86%
			REVENUE	\$	677,119.00	36,723.50	\$	44,751.48 6.61%
1035	302	000410	Leave Benefits	\$	11,303.00	1,148.42	\$	3,221.10 28.50%
1035	302	000420	Fringe Benefits	\$	16,175.00	1,335.96	\$	4,174.87 25.81%
1035	302	000421	Insurance Benefits	\$	44,870.00	5,513.87	\$	16,596.94 36.99%
1035	302	000425	PERS Benefits	\$	49,261.00	3,378.66	\$	10,186.19 20.68%
1035	302	000430	PERS Reserve	\$	3,684.00	126.36	\$	380.93 10.34%
1035	302	0010PM	Program Manager	\$	25,402.00	3,526.64	\$	10,833.57 42.65%
1035	302	0064ES	Eligibility Specialist	\$	118,137.00	8,579.33	\$	26,327.87 22.29%
1035	302	0076AA	Administrative Assistant	\$	40,684.00	4,348.02	\$	13,413.15 32.97%
			PERSONNEL	\$	309,516.00	27,957.26	\$	85,134.62 27.51%
1035	302	000504	Advertising	\$	10,000.00	\$	\$	500.00 5.00%
1035	302	000513	Board/Comm/Meeting Expense	\$	500.00	775.17	\$	945.78 189.16%
1035	302	000516	Computer Maintenance	\$	2,500.00	\$	\$	-
1035	302	000522	Contract Expense	\$	3,600.00	\$	\$	-
1035	302	000525	Copying	\$	3,000.00	170.94	\$	545.84 18.19%
1035	302	000531	Dues and Memberships	\$	1,000.00	\$	\$	550.00 55.00%

Fund	Dept	Account Number	Description	Budget	Beg Bal	Period Amt	End Bal	% Of Budget
1035	302	000533	Finance Indirect	\$	17,499.00	\$ 2,916.52	\$ 1,458.26	4,374.78 25.00%
1035	302	000534	Indirect Expense	\$	24,965.00	\$ 4,160.80	\$ 2,080.40	6,241.20 25.00%
1035	302	000535	Furniture & Fixtures	\$	500.00	\$ -	\$ -	- 0.00%
1035	302	000537	Insurance	\$	4,000.00	\$ -	\$ -	- 0.00%
1035	302	000542	Legal Services	\$	500.00	\$ 87.50	\$ -	87.50 17.50%
1035	302	000543	Licenses and Fees	\$	6,500.00	\$ 848.25	\$ 22.00	870.25 13.39%
1035	302	000549	Maintenance and Repair	\$	1,000.00	\$ 128.00	\$ -	128.00 12.80%
1035	302	000555	Postage	\$	2,500.00	\$ 253.53	\$ 146.08	399.61 15.98%
1035	302	000558	Printing	\$	4,000.00	\$ -	\$ -	- 0.00%
1035	302	000561	Rent	\$	14,940.00	\$ 2,490.00	\$ 1,245.00	3,735.00 25.00%
1035	302	000567	Supplies	\$	6,000.00	\$ 35.82	\$ 2,078.05	2,113.87 35.23%
1035	302	000568	Stipend	\$	137,808.00	\$ 6,902.40	\$ 4,738.13	11,640.53 8.45%
1035	302	000570	Technology Indirect	\$	19,520.00	\$ 3,253.32	\$ 1,626.66	4,879.98 25.00%
1035	302	000573	Telephone	\$	3,000.00	\$ 256.64	\$ 198.33	454.97 15.17%
1035	302	000576	Training	\$	12,000.00	\$ 4,623.75	\$ 1,790.56	6,414.31 53.45%
1035	302	000577	Volunteer Recognition	\$	20,000.00	\$ 2,403.98	\$ 468.08	2,872.06 14.36%
1035	302	000578	Volunteer Travel	\$	35,000.00	\$ 3,834.51	\$ 2,617.72	6,452.23 18.43%
1035	302	000579	Travel	\$	5,000.00	\$ 520.83	\$ 524.11	1,044.94 20.90%
1035	302	000583	Operating Contingency	\$	32,271.00	\$ -	\$ -	- 0.00%
			MATERIALS AND SUPPLIES	\$	367,603.00	\$ 34,311.36	\$ 19,939.49	54,250.85 14.76%
			EXPENSE	\$	677,119.00	\$ 91,488.72	\$ 47,896.75	139,385.47 20.59%
			NET GAIN / (LOSS)	\$	-	\$ (83,460.74)	\$ (11,173.25)	(94,633.99) 0.00%

CSP RSVP FINANCIAL STATEMENT

OCTOBER 2022

Monthly Financial Reports

Printed: 11/17/2022 11:33:15 AM

Period 04 - 04

Fiscal Year 2023

Fund	Dept	Account Number	Description	Budget	Beg Bal	Period Amt	End Bal	% Of Budget
1035	302	000710	Beg Bal-Restricted for Grants	\$	(15,000.00)	\$	\$	- 0.00%
1035	302	000725	Beg Bal-Restrict for Contracts	\$	(66,956.00)	\$	\$	- 0.00%
1035	302	000802	Fees For Service	\$	(500.00)	\$	\$	- 0.00%
1035	302	000806	Grant Revenue	\$	(48,000.00)	(34,472.12)	\$	(34,472.12) 71.82%
1035	302	000807	Donations	\$	(500.00)	\$	(300.00)	\$ (300.00) 60.00%
1035	302	000808	Interest Revenue	\$	-	(4.36)	\$	(1.54) 0.00%
1035	302	000805	Contract Revenue	\$	(510,563.00)	\$	(108,298.00)	\$ (108,298.00) 21.21%
1035	302	000824	Match	\$	(35,600.00)	(10,275.00)	\$	(3,600.00) 38.97%
			REVENUE	\$	677,119.00	44,751.48	\$	112,199.54 23.18%
1035	302	000410	Leave Benefits	\$	11,303.00	3,221.10	\$	1,199.52 39.11%
1035	302	000420	Fringe Benefits	\$	16,175.00	4,174.87	\$	3,997.02 50.52%
1035	302	000421	Insurance Benefits	\$	44,870.00	16,596.94	\$	6,404.55 51.26%
1035	302	000425	PERS Benefits	\$	49,261.00	10,186.19	\$	3,750.79 28.29%
1035	302	000430	PERS Reserve	\$	3,684.00	380.93	\$	131.73 13.92%
1035	302	0010PM	Program Manager	\$	25,402.00	10,833.57	\$	3,821.55 57.69%
1035	302	0064ES	Eligibility Specialist	\$	118,137.00	26,327.87	\$	10,101.27 30.84%
1035	302	0076AA	Administrative Assistant	\$	40,684.00	13,413.15	\$	5,311.79 46.03%
			PERSONNEL	\$	309,516.00	85,134.62	\$	34,718.22 38.72%
1035	302	000504	Advertising	\$	10,000.00	500.00	\$	1,830.80 23.31%
1035	302	000513	Board/Comm/Meeting Expense	\$	500.00	945.78	\$	244.19 237.99%
1035	302	000516	Computer Maintenance	\$	2,500.00	-	\$	- 0.00%
1035	302	000522	Contract Expense	\$	3,600.00	-	\$	- 0.00%
1035	302	000525	Copying	\$	3,000.00	545.84	\$	175.18 24.03%
1035	302	000531	Dues and Memberships	\$	1,000.00	550.00	\$	- 55.00%

Fund	Dept	Account Number	Description	Budget	Beg Bal	Period Amt	End Bal	% Of Budget				
1035	302	000533	Finance Indirect	\$	17,499.00	\$	4,374.78	\$	1,458.26	\$	5,833.04	33.33%
1035	302	000534	Indirect Expense	\$	24,965.00	\$	6,241.20	\$	2,080.40	\$	8,321.60	33.33%
1035	302	000535	Furniture & Fixtures	\$	500.00	\$	-	\$	-	\$	-	0.00%
1035	302	000537	Insurance	\$	4,000.00	\$	-	\$	-	\$	-	0.00%
1035	302	000542	Legal Services	\$	500.00	\$	87.50	\$	-	\$	87.50	17.50%
1035	302	000543	Licenses and Fees	\$	6,500.00	\$	870.25	\$	-	\$	870.25	13.39%
1035	302	000549	Maintenance and Repair	\$	1,000.00	\$	128.00	\$	-	\$	128.00	12.80%
1035	302	000555	Postage	\$	2,500.00	\$	399.61	\$	99.81	\$	499.42	19.98%
1035	302	000558	Printing	\$	4,000.00	\$	-	\$	-	\$	-	0.00%
1035	302	000561	Rent	\$	14,940.00	\$	3,735.00	\$	1,245.00	\$	4,980.00	33.33%
1035	302	000567	Supplies	\$	6,000.00	\$	2,113.87	\$	479.75	\$	2,593.62	43.23%
1035	302	000568	Stipend	\$	137,808.00	\$	11,640.53	\$	4,589.74	\$	16,230.27	11.78%
1035	302	000570	Technology Indirect	\$	19,520.00	\$	4,879.98	\$	1,626.66	\$	6,506.64	33.33%
1035	302	000573	Telephone	\$	3,000.00	\$	454.97	\$	162.09	\$	617.06	20.57%
1035	302	000576	Training	\$	12,000.00	\$	6,414.31	\$	-	\$	6,414.31	53.45%
1035	302	000577	Volunteer Recognition	\$	20,000.00	\$	2,872.06	\$	1,324.70	\$	4,196.76	20.98%
1035	302	000578	Volunteer Travel	\$	35,000.00	\$	6,452.23	\$	2,552.53	\$	9,004.76	25.73%
1035	302	000579	Travel	\$	5,000.00	\$	1,044.94	\$	506.00	\$	1,550.94	31.02%
1035	302	000583	Operating Contingency	\$	32,271.00	\$	-	\$	-	\$	-	0.00%
			MATERIALS AND SUPPLIES	\$	367,603.00	\$	54,250.85	\$	18,375.11	\$	72,625.96	19.76%
			EXPENSE	\$	677,119.00	\$	139,385.47	\$	53,093.33	\$	192,478.80	28.43%
			NET GAIN / (LOSS)	\$	-	\$	(94,633.99)	\$	59,106.21	\$	(35,527.78)	0.00%

CSP RSVP FINANCIAL STATEMENT

NOVEMBER 2022

Monthly Financial Reports

Printed: 12/19/2022 9:49:41 AM

Period 05 - 05

Fiscal Year 2023

Fund	Dept	Account Number	Description	Budget	Beg Bal	Period Amt	End Bal	% Of Budget
1035	302	000710	Beg Bal-Restricted for Grants	\$	(15,000.00)	\$ -	\$ -	0.00%
1035	302	000725	Beg Bal-Restrict for Contracts	\$	(66,956.00)	\$ -	\$ -	0.00%
1035	302	000802	Fees For Service	\$	(500.00)	\$ -	\$ -	0.00%
1035	302	000806	Grant Revenue	\$	(48,000.00)	(34,472.12)	\$ (34,472.12)	71.82%
1035	302	000807	Donations	\$	(500.00)	(300.00)	\$ (50.00)	70.00%
1035	302	000808	Interest Revenue	\$	-	(5.90)	\$ (1.65)	0.00%
1035	302	000805	Contract Revenue	\$	(510,563.00)	(108,298.00)	\$ -	21.21%
1035	302	000824	Match	\$	(35,600.00)	(13,875.00)	\$ -	38.97%
			REVENUE	\$	677,119.00	156,951.02	\$ 51.65	23.19%
1035	302	000410	Leave Benefits	\$	11,303.00	4,420.62	\$ 1,199.52	49.72%
1035	302	000420	Fringe Benefits	\$	16,175.00	8,171.89	\$ 1,615.02	60.51%
1035	302	000421	Insurance Benefits	\$	44,870.00	23,001.49	\$ 5,811.78	64.21%
1035	302	000425	PERS Benefits	\$	49,261.00	13,936.98	\$ 4,258.71	36.94%
1035	302	000430	PERS Reserve	\$	3,684.00	512.66	\$ 159.25	18.24%
1035	302	0010PM	Program Manager	\$	25,402.00	14,655.12	\$ 4,137.78	73.98%
1035	302	0064ES	Eligibility Specialist	\$	118,137.00	36,429.14	\$ 9,486.03	38.87%
1035	302	0076AA	Administrative Assistant	\$	40,684.00	18,724.94	\$ 4,748.65	57.70%
			PERSONNEL	\$	309,516.00	119,852.84	\$ 31,416.74	48.87%
1035	302	000504	Advertising	\$	10,000.00	2,330.80	\$ 545.00	28.76%
1035	302	000513	Board/Comm/Meeting Expense	\$	500.00	1,189.97	\$ 19.96	241.99%
1035	302	000516	Computer Maintenance	\$	2,500.00	-	\$ -	0.00%
1035	302	000522	Contract Expense	\$	3,600.00	-	\$ -	0.00%
1035	302	000525	Copying	\$	3,000.00	721.02	\$ 228.80	31.66%
1035	302	000531	Dues and Memberships	\$	1,000.00	550.00	\$ -	55.00%

Fund	Dept	Account Number	Description	Budget	Beg Bal	Period Amt	End Bal	% Of Budget				
1035	302	000533	Finance Indirect	\$	17,499.00	\$	1,458.26	\$	7,291.30	41.67%		
1035	302	000534	Indirect Expense	\$	24,965.00	\$	2,080.40	\$	10,402.00	41.67%		
1035	302	000535	Furniture & Fixtures	\$	500.00	\$	-	\$	-	0.00%		
1035	302	000537	Insurance	\$	4,000.00	\$	-	\$	-	0.00%		
1035	302	000542	Legal Services	\$	500.00	\$	87.50	\$	-	\$	87.50	17.50%
1035	302	000543	Licenses and Fees	\$	6,500.00	\$	870.25	\$	9,400.00	\$	10,270.25	158.00%
1035	302	000549	Maintenance and Repair	\$	1,000.00	\$	128.00	\$	508.00	\$	636.00	63.60%
1035	302	000555	Postage	\$	2,500.00	\$	499.42	\$	158.50	\$	657.92	26.32%
1035	302	000558	Printing	\$	4,000.00	\$	-	\$	-	\$	-	0.00%
1035	302	000561	Rent	\$	14,940.00	\$	4,980.00	\$	1,245.00	\$	6,225.00	41.67%
1035	302	000567	Supplies	\$	6,000.00	\$	2,593.62	\$	372.27	\$	2,965.89	49.43%
1035	302	000568	Stipend	\$	137,808.00	\$	16,230.27	\$	7,129.15	\$	23,359.42	16.95%
1035	302	000570	Technology Indirect	\$	19,520.00	\$	6,506.64	\$	1,626.66	\$	8,133.30	41.67%
1035	302	000573	Telephone	\$	3,000.00	\$	617.06	\$	248.79	\$	865.85	28.86%
1035	302	000576	Training	\$	12,000.00	\$	6,414.31	\$	17.86	\$	6,432.17	53.60%
1035	302	000577	Volunteer Recognition	\$	20,000.00	\$	4,196.76	\$	1,323.71	\$	5,520.47	27.60%
1035	302	000578	Volunteer Travel	\$	35,000.00	\$	9,004.76	\$	2,538.00	\$	11,542.76	32.98%
1035	302	000579	Travel	\$	5,000.00	\$	1,550.94	\$	452.45	\$	2,003.39	40.07%
1035	302	000583	Operating Contingency	\$	32,271.00	\$	-	\$	-	\$	-	0.00%
			MATERIALS AND SUPPLIES	\$	367,603.00	\$	72,625.96	\$	29,352.81	\$	101,978.77	27.74%
			EXPENSE	\$	677,119.00	\$	192,478.80	\$	60,769.55	\$	253,248.35	37.40%
			NET GAIN / (LOSS)	\$	-	\$	(35,527.78)	\$	(60,717.90)	\$	(96,245.68)	0.00%

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Angelita Sanchez
Councilor-Elect,
Sweet Home
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*Indicates Executive Committee

Nondiscrimination Policy

OCWCOG'S Nondiscrimination Policy states, "Oregon Cascades West Council of Governments (OCWCOG) recognizes that the strength and growth of the Agency is in its people. It is our policy to provide equal employment opportunities to all qualified persons without regard to race, religion, color, sex, sexual orientation, gender identity, national origin, age, mental or physical disability, genetic information, military status, marital status, veteran's status, injured worker's status, or other protected status or activity in accordance with applicable law."

The Senior Companion Program Volunteer Handbook states, "Oregon Cascades West Council of Governments believes in equal opportunities. We will not discriminate on the basis of race, color, religion, national origin, sex, disability, sexual orientation, or veteran status. Reasonable accommodation will be made for individuals with mental, physical, and sensory disabilities."



Request for Applications (RFA): Community Development Block Grant Activities

Applications Due by 5:00 p.m. Thursday, January 19, 2023 (PST)

333 Broadalbin Street SW, PO Box 490, Albany, Oregon 97321-0144 | Planning 541-917-7550

EXHIBIT A: APPLICATION

5.1 Applicant Information

Applicant (organization name): Mid-Willamette Family YMCA

Contact Person: Tami Speten Email: grants@ymcaalbany.org

Mailing Address: 3201 Pacific Blvd. SW Albany, OR 97321

Phone #: 541-926-4488 Agency website: www.ymcaalbany.org

UEI #: RBRVWQNQL4K1 EIN: 93-0479079

Organization Mission Statement :

The mission of the Mid-Willamette Family YMCA is to put Christian principles into practice through programs that build a healthy spirit, mind and body for all. Our YMCA serves over 6,000 members who represent the communities of Albany, Lebanon, Tangent, Corvallis, Philomath, Jefferson, Sweet Home and Brownsville.

5.2 Proposal Summary

Activity/Program Name: Low-Income Childcare

Activity Location: Growing Leaders Early Learning Center @ 1054 29th Ave SW Albany

Proposal Summary: *Provide a summary of the proposed activity and anticipated outcomes.*

In recent years the YMCA has made great strides toward improving the accessibility and affordability of childcare in our community. The opening of Growing Leaders and now expansion to Mighty Explorers increased the number of available childcare slots, addressing the massive need in Albany for childcare slots in center-based care for pre-school aged children. These programs offer education, nurturing environments where children in our community have a chance to learn, grow, and thrive. Scholarships make these programs affordable for those families who would not otherwise be able to afford to send their child into a nurturing setting rich with opportunities. CDBG funds would be utilized to expand the scholarship program to include more families of low to moderate income levels. We anticipate the outcomes to be long-term and far reaching, as children develop school readiness, and parents utilize extended hours care to further themselves through employment and schooling. For both parents and children, the greatest outcome of reliable, educational, and affordable childcare is a path out of poverty and toward greater success.

ACTIVITY BUDGET FOR WHICH CDBG FUNDS ARE BEING REQUESTED:

CDBG Funding Request	\$	48,600
Leveraged Funds/Resources	\$	554,635
Total Activity Budget	\$	1,101,235



Request for Applications (RFA): Community Development Block Grant Activities

Applications Due by 5:00 p.m. Thursday, January 19, 2023 (PST)

333 Broadalbin Street SW, PO Box 490, Albany, Oregon 97321-0144 | Planning 541-917-7550

5.3 CDBG Application Narrative

Provide the information requested below **in a separate document** making sure the narrative corresponds to the numbers provided so the required information can be easily found to ensure a complete application. If the question does not apply to the proposed project write N/A.

Activity Description

1. Explain which priorities in Albany's 2023-2027 Consolidated Plan will be addressed by the activity.
2. Describe the community need that will be addressed by the proposed activity.
3. Explain how the activity is an effective strategy to address the identified gap in needs. Provide statistics or evidence to document the activity need.
4. Please specify which CDBG National Objective(s) will be satisfied by the proposed activity.
5. Explain how the project will promote inclusiveness and diversity. Include your agency's nondiscrimination policy for employees and clients as an attachment.
6. For faith-based organizations, explain how your agency will ensure CDBG funded activities are separate from explicitly religious activities such as worship, study of religious text, or evangelizing.

Benefit to low-income Albany residents

7. Who and how many will benefit from activity (estimate # of people, describe clients)?
8. Of these, how many are estimated to be extremely low-income (earning <30% of area median)? Is there any special emphasis on serving extremely low-income residents?

Scope of Work

9. Provide a **DRAFT SCOPE OF WORK** that outlines details about the proposed activity including all actions that will be taken to address the identified need and achieve anticipated performance measures and outcomes, and general accomplishments you intend to achieve with this activity.

Project Feasibility – Readiness to proceed

10. Please describe your readiness to proceed, whether land use or other issues are resolved and whether your organization has the administrative capacity to complete the proposed project. Describe the current organizational capacity to complete and manage the activity within the program year.
11. Please complete the schedule that follows or provide one that is applicable to the activity/project that outlines when major activities will be executed and when the project will be completed.

Organizational Capacity and Activity Sustainability

12. Describe experience and success conducting similar projects, use of federal or CDBG funds.
13. If any issues were raised during a federal program monitoring evaluation, please explain the findings and how issues were resolved.
14. Explain agency experience managing construction projects subject to Davis-Bacon and/or BOLI wage requirements and/or soliciting bids for construction projects.
15. Identify any other agencies or partners for this activity/project and define the roles and responsibilities of these partners.
16. Please explain how the agency embraces and demonstrates diversity within the organization.
17. If not fully funded, will the agency be able to pursue the activity/service (possibly at a reduced scale)?

Financial

18. Why are CDBG funds the best fit/source? Are there other sources of funding for this activity?



Request for Applications (RFA): Community Development Block Grant Activities

Applications Due by 5:00 p.m. Thursday, January 19, 2023 (PST)

333 Broadalbin Street SW, PO Box 490, Albany, Oregon 97321-0144 | Planning 541-917-7550

5.4 Proposed Activity Budget

Provide the activity budget describing total cost, cost per task, existing (secured) project funds and unfunded costs. (DO NOT PROVIDE THE FULL AGENCY BUDGET HERE JUST THE ACTIVITY BUDGET.) Identify any and all source(s) of funding. This would include other Federal and State grants and loans, monetary donations, in-kind contributions, volunteer labor, donation of materials and supplies, etc. **Use the template provided below or your own as long as the same information is provided.**

Activity/Project Budget Summary (See 24 CFR 570 Subpart J)			
Estimated Total Cost of Activity:	\$1,101,235		
CDBG Funding Requested for Activity:	\$48,600		
Total Number of People/Households Served:	79 households		
Total Cost per Person/Household:	\$1,106 per child/month		
Total CDBG Cost per Person/Unit	\$337.50 per child/month		
Describe Source of Other Funds:	Amount	Amount Secured	Amount Tentative
Federal: Preschool Promise	450,000	450,000	
State: ERDC Funding	199,080	199,080	
Local: Tuition fees and corporate partnerships	208,920	208,920	
Donations/Private: Fundraiser contributions	146,635		146,635
Grants:	48,000		48,000
Loans:			
Activity Budget Detail (Non-Development Activities)			
Specific Cost Item/Description	CDBG Amount Requested	Other Funds Amount	Total Amount CDBG + Other Sources
Payroll and taxes/benefits	\$0	\$747,000	\$747,000
Occupancy	\$0	\$69,485	\$69,485
Utilities	\$0	\$7,300	\$7,300
Supplies	\$0	\$134,400	\$134,400
Childcare scholarships	\$48,600	\$41,400	\$90,000
Professional fees and Dues	\$0	\$51,250	\$51,250
Insurance	\$0	\$1,800	\$1,800
Total	\$48,600	\$1,052,635	\$1,101,235



Request for Applications (RFA): Community Development Block Grant Activities

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5.5 Staff Experience and Qualifications

Identify the names of staff or contractors participating in the proposed program or activity, their role, experience they have in this role, their title, and the expected FTE on the project. **Include in an attachment resumes for key personnel anticipated to work on the proposed program, project, or activity.** Please make sure to identify the person responsible for collecting program performance data and preparing the quarterly reports for the City.

Employee	Experience and Qualifications
Name: Patty Shukle Title: Director FTE on This Project: .50	Experience: 12 years in Early Childhood Education Qualifications: Bachelor of Science degree in Early Childhood Education, Step 10 on ORO Time at Growing Leaders: 1 year
Name: Tami Speten Title: Outreach Coordinator FTE on This Project: .10 ****KEY PERSONNEL	BS-Psychology, Master's Occupational Therapy Over twenty years experience as a pediatric occupational therapist. Eight years experience working with Oregon Public Schools, and Sixteen years of experience as a grant writer and reporter for non-profit organizations. ** Responsible for collecting data and preparing reports
Name: Donna Skinner Title: Lead Teacher FTE on This Project: .50	Experience: 8 years, both as teaching assistant and lead teacher, 2 years in current position as Lead Teacher Qualifications: Step 8 on ORO Time at Growing Leaders: 2 years
Name: Katie Provence Title: Lead Teacher FTE on This Project: .50	Experience: 8 years as Lead Teacher Qualifications: Associate's degree in Child and Family Studies, Step 9 on ORO Time at Growing Leaders: 1 year 4 months
Name: Brenna Beyer Title: Lead Teacher FTE on This Project: .50	Experience: 2 years as teaching assistant, 3 years as Lead teacher Qualifications: Bachelor of Science in Human Development and family Sciences, minor in Education Time at Growing Leaders: 1 year 4 months



Request for Applications (RFA): Community Development Block Grant Activities

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333 Broadalbin Street SW, PO Box 490, Albany, Oregon 97321-0144 | Planning 541-917-7550

<p>Name: Emma Denley</p> <p>Title: Lead Teacher</p> <p>FTE on This Project: .50</p>	<p>Experience: 2 years as child care worker, 1 year as Family Support Specialist, 4 years as nanny, 6 mo in current role as Lead Teacher</p> <p>Qualifications: Bachelor of Science degree in Family and Human Services</p> <p>Time at Growing Leaders: 5 months</p>
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YMCA 2023 Application

1. Our program will provide affordable childcare to low and middle income Albany residents, allowing parents to pursue career and educational opportunities that will provide financial stability for their families. This program addresses the priorities identified in the consolidated plan of Economic Development, Childcare Needs, and Anti-Poverty Strategy.
 2. Our community continues to experience a dire need for childcare. Even prior to the pandemic this area was referred to as a “Childcare Desert,” reflecting the inadequate number of childcare slots to match the number of children needing care. Scholarships for childcare will address the community need for childcare that accommodates family’s flexible schedules, allowing parents to pursue education and employment that occurs outside of the “9-5” schedule.
 3. This program will address the need for additional childcare slots in our community by providing needed funds in the form of scholarships that will allow families of low and moderate income to access childcare at an affordable rate. For many families, there is state funding available through ERDC to cover employment related childcare costs. However, there is often still a gap between what the state will cover and the cost of childcare. Currently approximately half of children enrolled in care at Growing Leaders receive these ERDC funds, and two-thirds of those families are unable to bridge the financial gap. Scholarship funds will allow us to lend assistance to families who qualify as low- or moderate-income.
 4. This program will benefit low– and moderate-income persons, an identified and named national objective of CDBG.
 5. The Mid-Willamette YMCA is deeply committed to providing equity in opportunity. To that end we have worked diligently to extend our outreach efforts through community partnerships with the intent of bringing our programs to families that need them the most. We have established a relationship with the Oregon Department of Education, the Oregon Health Authority, and our local Department of Human Services, as well as continuing our partnerships with the Early Learning Hub, Linn Benton Lincoln ESD, and Greater Albany Public School District. These partnerships have helped us reach parents and children in our community that, due to a variety of factors, would previously have been unlikely to access childcare programs. Driven by a desire to make early education available to all, our Early Learning Centers are committed to helping families that fall below the two-hundred percent of poverty line access early learning opportunities, as well as those marginalized populations who have traditionally experienced limited access to early learning programs. The Y understands the uniqueness of today’s families and the socio-economic conditions that can have a downstream effect on our children. We also realize that identifying special needs early can be a significant determinant of a child’s future success. Linn County has the highest number of children under six living at or below the Federal poverty line in our Early Learning Hub region. The Y is committed to identifying the resources necessary to help children thrive while helping close the opportunity gap in our county by creating accessibility where obstacles have historically existed.
- ** Please see attached Non-Discrimination Policy**
6. The Mid-Willamette Family YMCA is a faith-based organization, providing community programs and activities that are open and welcome to all. Our childcare programs, operated outside our main campus, are not religious in nature. We recognize that to make every family feel comfortable and represented it is necessary to offer childcare in a setting that reflects the diversity of our community and does not discriminate against or promote any faith or religious beliefs.
 7. The target population for this program is low– and moderate-income families with young children who reside in the City of Albany. Based upon the current level of need reflected in our program, we anticipate providing scholarships toward the monthly tuition costs of seventy-five children, either on a one-time or on-going basis, depending on documented need.
 8. We anticipate that at least half of these children will fall in the extremely low-income bracket, indicating that their parents earn <30% of the area median. This information is based upon our experience with previous scholarship applicants. Many of our referrals come from the Department of Human Services, and significant outreach is performed to make our program

readily available for families with extremely low income levels.

9. Since planning began to open the doors of Growing Leaders, we have heard one consistent message from our community. The need for childcare is tremendous. Furthermore, the need is overwhelming for financial support to create accessibility and equity of opportunity for families of low- and moderate-income levels. The current proposal will allow us to continue to offer financial scholarships to families with documented need. Families will be qualified through income verification, and success of the program will be measured through data collection and family report. Our current level of programming will continue at Growing Leaders, with the following objectives to be achieved:

- Scholarships provided to close the gap between state assistance and tuition costs.
- Sustainable enrollment: Consistent attendance for enrolled families, as the need to stop and start services due to financial hardship will be eliminated.
- Pre-school aged children will emerge from our program and enter local public schools ready to learn.
- Reduced familial stress due to access to reliable childcare and financial relief.
- Families achieving greater career success and longevity due to access to affordable childcare with flexible hours.

10. Growing Leaders Early Learning Center is a fully operational program that has earned positive reviews in the community. The Mid-Willamette Family YMCA is a well-reputed community asset with a strong emphasis on family programs. Our agency has demonstrated the capacity to manage CDBG funds throughout 2020 and 2021. The immediate success of Growing Leaders is a testimony to our extensive community support and organizational capacity. We have infrastructure in place that has supported expansion of our programming to include an additional site.

Our staff is ready and prepared, and possesses the organizational capacity to manage the distribution of scholarship funds and tracking of income-qualification for this program.

11. Schedule:

6/1/2023 Begin certification and qualification of low- and moderate-income families at Growing Leaders ELC. using the form provided by the City of Albany for income verification

6/19/2023 Begin summer programming at Growing Leaders

7/1/2023 Begin scholarship distribution based upon income qualification

8/1/2023 through 6/30/2024 Scholarship funds distributed based upon need.

12. In November of 2020 the YMCA was approved for CDBG funds through the City of Albany to fund scholarships for our childcare and distance learning programs. Recognizing the dramatic need for healthy and positive opportunities for our community's children, we opened the doors of Growing Leaders Early Learning Center to address the goal of increasing accessible and affordable childcare in Albany. This program has been a tremendous success, as we heard the stories of numerous families who would not be able to afford care for their children without financial assistance. The funds provided through CDBG in 2020 and 2021 opened doors to brighter futures for 58 children, and the YMCA stands ready to continue this worthwhile endeavor and meet this ever growing need in our community.

13. N/A

14. The Mid-Willamette Family YMCA is familiar with the rigorous demands of large construction projects, having completed an extensive, ten-year capital campaign that allowed us to build a new facility to house our programs, completed six years ago. The YMCA has recently completed renovation of an existing warehouse to accommodate additional fitness programs, and we are in the midst of building a multi-field sports complex to benefit the entire community. All of these experiences have given us the structure and knowledge necessary to complete renovation on the Growing Leaders Early Learning Center last year, and our most recent project of renovating the new site of Mighty Explorers.

15. The YMCA has well-established relationships with the Linn-Benton Early Learning Hub and the state of Oregon for the Preschool Promise program. Additionally, we have worked closely with the Department of Human Services to establish

referrals with an emphasis on the needs of low and moderate income families. Our community partners included local businesses such as Samaritan Health Services, as our program offers their employees childcare slots that accommodate the flexible hours they need. Although implementation of our scholarship program is not reliant upon these partnerships, we value their input and guidance.

16. The YMCA, from its membership to its Board of Directors, is a vibrant community that is representative of the City of Albany. Our childcare program is diverse, and through policy and structure we strive to make every family feel welcome and accepted. Our childcare staff also reflects this diversity, as we endeavor to represent the cultures, languages, and beliefs of the children and families we serve. The curriculum of our program also supports this diversity through exposure and learning about a variety of topics and cultural customs.

17. If not fully funded this program will be able to operate on a smaller scale.

18. While the YMCA will continue to fundraise through special events and donations, we feel that CDBG funds are the best fit for this program because of the strong emphasis on the identified goal of reducing poverty and improving the economic condition of families of young children in our community. This program has a clear and direct impact on the financial health of families in Albany, and therefore a direct link to the priorities established for CDBG funds.

Non-discrimination Policy:

The YMCA is a place for all. Our engagement with the community is far-reaching, but we recognize the need for continued focus on outreach. Our Board of Directors and Staff are representative of the community we serve, and the statistics represent the overall demographic of this area. However, we recognize the pressing and imperative need to reach minority populations that are uniquely vulnerable, and, accordingly, we are ramping up our efforts in outreach and networking with other organizations to work toward a goal of greater diversity.

At the Mid-Willamette Family YMCA we value unique individuals, and we welcome the variety of experiences they bring to our organization in all capacities. As such, we have a strict non-discrimination policy. We believe everyone should be treated equally regardless of race, sex, gender identification, sexual orientation, national origin, native language, religion, age, disability, marital status, citizenship, genetic information, pregnancy, or any other characteristic protected by law. If you feel that you have been discriminated against, please contact our Human Resources Department as soon as possible. Every complaint will be appropriately investigated.

Mid-Willamette Family YMCA
All Departments Profit & Loss Budget Overview
 January through December 2022

	Jan 22	Feb 22	Mar 22	Apr 22	May 22	Jun 22	Jul 22	Aug 22	Sep 22	Oct 22	Nov 22	Dec 22	TOTAL Jan - Dec 22
Ordinary Income/Expense													
Income													
01 · Contribution	139,107.25	128,145.25	51,477.25	646,477.25	71,477.25	66,477.25	163,477.25	71,477.25	71,477.25	71,477.25	71,477.25	178,477.25	1,731,025.00
08 · United Way Contributions	833.00	833.00	833.00	833.00	833.00	833.00	833.00	833.00	833.00	833.00	833.00	833.00	9,996.00
11 · Membership Dues	84,325.00	84,325.00	84,325.00	84,325.00	84,325.00	84,325.00	84,325.00	84,325.00	84,325.00	84,325.00	85,325.00	85,325.00	1,013,900.00
12 · Guest Passes	2,440.00	2,440.00	2,440.00	2,440.00	2,440.00	2,440.00	2,440.00	2,440.00	2,440.00	2,440.00	2,440.00	2,440.00	29,280.00
13 · Program Income	83,029.00	86,581.00	109,131.00	94,891.00	106,091.00	100,756.00	162,521.00	122,761.00	109,946.00	94,606.00	98,406.00	90,986.00	1,259,705.00
14 · Sales	807.00	780.00	780.00	780.00	780.00	780.00	780.00	780.00	780.00	780.00	780.00	780.00	9,387.00
16 · Miscellaneous	6,850.00	250.00	3,450.00	250.00	13,750.00	21,250.00	3,750.00	250.00	3,450.00	250.00	250.00	2,250.00	56,000.00
Total Income	317,391.25	303,354.25	252,436.25	829,996.25	279,696.25	276,861.25	418,126.25	282,866.25	273,251.25	254,711.25	259,511.25	361,091.25	4,109,293.00
Gross Profit	317,391.25	303,354.25	252,436.25	829,996.25	279,696.25	276,861.25	418,126.25	282,866.25	273,251.25	254,711.25	259,511.25	361,091.25	4,109,293.00
Expense													
21 · Salaries & Wages	171,045.83	162,628.86	181,173.45	172,061.63	176,906.92	198,615.41	219,685.42	220,868.48	180,927.45	179,919.88	181,524.20	185,085.16	2,230,442.69
22 · Employee Benefits	25,416.70	25,416.70	25,416.70	25,416.70	25,416.70	25,416.70	25,416.70	25,416.70	25,416.70	25,416.70	25,416.70	25,416.70	305,000.40
23 · Payroll Taxes	21,591.25	13,944.77	15,737.61	21,638.51	15,142.69	16,840.75	24,507.69	18,582.62	15,591.48	22,324.51	15,622.22	15,921.02	217,445.12
24 · Contract Services	10,415.66	10,815.66	11,865.66	10,415.66	10,415.66	28,915.66	10,415.66	12,445.66	10,415.66	10,415.66	10,415.66	11,207.74	148,160.00
25 · Supplies	23,448.23	23,038.23	22,668.23	22,218.23	27,268.23	26,848.27	19,701.57	16,651.57	27,571.57	13,951.57	15,001.57	16,961.57	255,328.84
26 · Telephone & Communications	3,435.00	3,533.00	3,533.00	3,533.00	3,533.00	3,533.00	3,533.00	3,533.00	3,533.00	3,533.00	3,533.00	3,537.00	42,302.00
27 · Postage	623.00	485.00	488.00	485.00	488.00	485.00	488.00	485.00	488.00	485.00	488.00	485.00	5,973.00
28 · Occupancy	22,134.95	19,536.94	19,536.94	20,436.94	19,596.94	19,686.94	20,758.94	19,916.94	19,756.94	20,656.94	20,226.94	19,638.94	241,885.29
29 · Equipt. & Building Cost, Leases	48,885.67	22,245.50	18,763.00	19,823.00	18,763.00	18,763.00	18,523.00	17,463.00	17,463.00	18,523.00	17,463.00	17,443.00	254,121.17
30 · Fund Raising Expense	3,750.00	3,750.00	3,750.00	3,750.00	3,750.00	3,750.00	3,750.00	3,750.00	3,750.00	3,750.00	3,750.00	3,750.00	45,000.00
31 · Printing, Publishing, Promotion	416.66	3,416.66	3,416.66	1,916.66	1,916.66	3,416.66	1,916.66	1,916.66	3,416.66	1,916.66	1,916.66	3,416.74	29,000.00
32 · Travel & Employee Expenses	94.50	134.50	134.50	134.50	134.50	184.50	184.50	184.50	134.50	134.50	134.50	150.50	1,740.00
33 · Conf/Conv/Meetings	520.83	520.83	1,020.83	520.83	520.83	1,020.83	520.83	520.83	1,020.83	520.83	520.83	1,020.87	8,250.00
35 · Payment of Dues	4,786.55	4,786.55	4,786.55	4,786.55	4,786.55	4,786.55	4,786.55	4,786.55	19,177.80	4,786.55	4,786.55	4,786.55	71,829.85
37 · Financing	22,941.00	12,275.00	12,275.00	27,275.00	12,275.00	12,275.00	27,275.00	12,275.00	12,275.00	27,275.00	12,275.00	12,275.00	202,966.00
38 · Liability Insurance	12,268.00	5,150.00	5,150.00	5,150.00	5,150.00	5,150.00	5,150.00	5,150.00	5,150.00	150.00	150.00	150.00	53,918.00
39 · Miscellaneous Expenses	0.00	0.00	250.00	250.00	0.00	0.00	250.00	0.00	0.00	250.00	0.00	0.00	1,000.00
Total Expense	371,773.83	311,678.20	329,966.13	339,812.21	326,064.68	369,688.27	386,863.52	363,946.51	346,088.59	334,009.80	313,224.83	321,245.79	4,114,362.36
Net Ordinary Income	-54,382.58	-8,323.95	-77,529.88	490,184.04	-46,368.43	-92,827.02	31,262.73	-81,080.26	-72,837.34	-79,298.55	-53,713.58	39,845.46	-5,069.36
Net Income	-54,382.58	-8,323.95	-77,529.88	490,184.04	-46,368.43	-92,827.02	31,262.73	-81,080.26	-72,837.34	-79,298.55	-53,713.58	39,845.46	-5,069.36

Mid-Willamette Family YMCA Board of Directors 9/30/22

Name	Business Information	Phone	Email Address
Greg Anable	Whit's End Computing	C. 541-979-9320	ganable3@gmail.com
	3415 Takena SW		
	Albany, OR 97321		
Janel Bennett	Sybaris	541-928-8157	mpbandjra@msn.com
	442 First Avenue W	C. 541-619-8489	
	Albany, OR 97321	F. 541-928-8826	
Jay Burcham	Burcham's Metals	541-926-4616	burchamj@comcast.net
	3407 Pacific Boulevard SW	C. 541-979-5640	
	Albany, OR 97321	F. 541-926-5150	
Stan Boshart	Boshart Trucking	541-928-8662	stan@bosharttrucking.com
Vice President	32788 Tangent Loop	C. 541-936-0244	
	Tangent, OR 97389		
Dr. George Dooley	Retired	541-745-5419	Maryekhrys@msn.com
Patricia (Patti) Daskalos		C. 541-974-2020	pdask@mac.com
Kristal Dufour	Aasum-Dufour Funeral Home	541-926-5541	kristal.dufour@aasum-dufour.com
Past President	805 SW Ellsworth Street	C. 541-619-7785	
	Albany, OR 97321		
Glenn Edwards	Farmers Insurance	541-926-3068	gedwards@farmersagent.com
		c. 541-979-4829	

Mid-Willamette Family YMCA Board of Directors 9/30/22

Name	Business Information	Phone	Email Address
Tim Fitzpatrick	Fitzpatrick Painting	541-967-8900	tim@fitzpatrickpainting.com
	P.O. Box 2376	C. 541-990-7306	
	Corvallis, OR 97339		
Tom Gerding	Gerding Companies	541-753-2012	tomg@gerdingcompanies.com
	P.O. Box 1082	C. 541-230-0224	
	Corvallis, OR 97339		
Amanda Goodwin	Central Willamette Credit Union	541-918-7545	agoodwin@centralwcu.org
Sandi Gordon	Aldrich Wealth LP	541-905-5544	sandikgordon@gmail.com
	680 Hawthorne Ave SE, #140		
	Salem, OR 97301		
Kerry Johnson		C. 541-974-2344	kerry@kerryjohnson.org
Joel Kalberer	Weatherford Thompson, et al	541-926-2255	jdk@wtlegal.com
President	P.O. Box 667, 130 1st Avenue W	C. 541-758-9362	
	Albany, OR 97321		
Adam Kohler	Pacific Power		adam.kohler@pacificorp.com

Mid-Willamette Family YMCA Board of Directors 9/30/22

Name	Business Information	Phone	Email Address
Mike Martin	Valley Fire Control	541.928.9523	mike@alk.to
Past President	<u>217 Main St SE</u>		
	<u>Albany, OR 97321</u>		
Dan Purcell	Accenture	541-924-1741	d.purcell@accenture.com
	3939 Old Salem Rd	C. 908-783-1877	
	Albany, OR 97321		
Micah Smith	Linn-County Sherriff's Office		deputysmith770@gmail.com
	718 Seventh Ave SW		
	Albany, OR 97321		
Mike Sykes	Mike's Heating and Air	541-936-0654	mike@mikesac.com
Jennifer Taylor-Winney	Division of Health & Exercise Science	503-838-8923	taylorj@mail.wou.edu
	Western Oregon University	C. 530-624-2493	
	Monmouth, OR 97361		
JT Thomas	OSU Foundation	541-760-4159	jason.michael.thomas@icloud.com
	4238 SW Research Way		jason.thomas@osufoundation.org
Staff:			
Chris Reese	Mid-Willamette Family YMCA	541-926-4488 ext 103	executive@ymcaalbany.org
CEO	3201 Pacific Boulevard SW	F. 541-928-0071	
	Albany, OR 97321	C. 503-689-3160	

Mid-Willamette Family YMCA

Early Learning Center

September 2022

	Sep 22	Budget	\$ Over Budget	Jan - Sep 22	YTD Budget	\$ Over Budget	Annual Budget
Ordinary Income/Expense							
Income							
01 • Contribution	49,440.00	41,200.00	8,240.00	567,724.84	458,430.00	109,294.84	582,030.00
13 • Program Income	23,293.66	47,340.00	-24,046.34	246,875.98	426,060.00	-179,184.02	568,080.00
16 • Miscellaneous	0.00	0.00	0.00	9,875.00	0.00	9,875.00	0.00
Total Income	72,733.66	88,540.00	-15,806.34	824,475.82	884,490.00	-60,014.18	1,150,110.00
Gross Profit	72,733.66	88,540.00	-15,806.34	824,475.82	884,490.00	-60,014.18	1,150,110.00
Expense							
21 • Salaries & Wages	42,287.77	50,325.00	-8,037.23	423,480.03	446,706.50	-23,226.47	599,781.50
22 • Employee Benefits	1,574.04	8,437.00	-6,862.96	33,272.39	75,933.00	-42,660.61	101,244.00
23 • Payroll Taxes	4,148.60	3,849.86	298.74	45,958.95	34,173.05	11,785.90	45,883.30
24 • Contract Services	3,484.12	2,249.00	1,235.12	25,127.31	20,241.00	4,886.31	27,000.00
25 • Supplies	10,190.98	7,466.57	2,724.41	122,554.15	111,999.13	10,555.02	134,398.84
26 • Telephone & Communications	571.18	200.00	371.18	5,262.80	1,702.00	3,560.80	2,302.00
27 • Postage & Shipping	0.00	0.00	0.00	31.00	0.00	31.00	0.00
28 • Occupancy	1,122.10	1,257.94	-135.84	9,477.23	10,671.47	-1,194.24	14,185.29
29 • Equipt. & Building Cost, Leases	2,846.00	2,000.00	846.00	30,636.75	38,500.00	-7,863.25	44,500.00
31 • Printing, Publishing, Promotion	0.00	416.66	-416.66	2,061.67	3,749.94	-1,688.27	5,000.00
32 • Travel & Employee Expenses	0.00	42.00	-42.00	0.00	378.00	-378.00	500.00
33 • Conf/Conv/Meetings	600.00	208.33	391.67	1,161.53	1,874.97	-713.44	2,500.00
35 • Payment of Dues	1,272.83	1,770.80	-497.97	13,531.56	15,937.20	-2,405.64	21,249.60
37 • Financing	615.05	900.00	-284.95	3,708.95	8,100.00	-4,391.05	10,800.00
38 • Liability Insurance	150.00	150.00	0.00	1,350.00	1,350.00	0.00	1,800.00
39 • Miscellaneous Expenses	0.00	0.00	0.00	-533.43	0.00	-533.43	0.00
Total Expense	68,862.67	79,273.16	-10,410.49	717,080.89	771,316.26	-54,235.37	1,011,144.53
Net Ordinary Income	3,870.99	9,266.84	-5,395.85	107,394.93	113,173.74	-5,778.81	138,965.47
Net Income	3,870.99	9,266.84	-5,395.85	107,394.93	113,173.74	-5,778.81	138,965.47

Mid-Willamette Family YMCA
Early Learning Center
October 2022

	Oct 22	Budget	\$ Over Budget	Jan - Oct 22	YTD Budget	\$ Over Budget	Annual Budget
Ordinary Income/Expense							
Income							
01 - Contribution	49,090.91	41,200.00	7,890.91	616,466.66	499,630.00	116,836.66	582,030.00
13 - Program Income	34,078.00	47,340.00	-13,262.00	280,953.98	473,400.00	-192,446.02	568,080.00
16 - Miscellaneous	0.00	0.00	0.00	9,875.00	0.00	9,875.00	0.00
Total Income	83,168.91	88,540.00	-5,371.09	907,295.64	973,030.00	-65,734.36	1,150,110.00
Gross Profit	83,168.91	88,540.00	-5,371.09	907,295.64	973,030.00	-65,734.36	1,150,110.00
Expense							
21 - Salaries & Wages	41,210.90	49,455.00	-8,244.10	464,236.39	496,161.50	-31,925.11	599,781.50
22 - Employee Benefits	2,208.64	8,437.00	-6,228.36	35,481.03	84,370.00	-48,888.97	101,244.00
23 - Payroll Taxes	4,059.81	3,783.31	276.50	50,018.76	37,956.36	12,062.40	45,883.30
24 - Contract Services	1,701.89	2,249.00	-547.11	26,829.20	22,490.00	4,339.20	27,000.00
25 - Supplies	5,905.40	7,466.57	-1,561.17	128,629.81	119,465.70	9,164.11	134,398.84
26 - Telephone & Communications	571.18	200.00	371.18	5,955.98	1,902.00	4,053.98	2,302.00
27 - Postage & Shipping	0.00	0.00	0.00	31.00	0.00	31.00	0.00
28 - Occupancy	742.82	1,257.94	-515.12	10,220.05	11,929.41	-1,709.36	14,185.29
29 - Equipt. & Building Cost, Leases	483.00	2,000.00	-1,517.00	31,119.75	40,500.00	-9,380.25	44,500.00
31 - Printing, Publishing, Promotion	0.00	416.66	-416.66	2,061.67	4,166.60	-2,104.93	5,000.00
32 - Travel & Employee Expenses	0.00	42.00	-42.00	0.00	420.00	-420.00	500.00
33 - Conf/Conv/Meetings	10.00	208.33	-198.33	1,171.53	2,083.30	-911.77	2,500.00
35 - Payment of Dues	1,455.46	1,770.80	-315.34	14,987.02	17,708.00	-2,720.98	21,249.60
37 - Financing	867.46	900.00	-32.54	4,576.41	9,000.00	-4,423.59	10,800.00
38 - Liability Insurance	163.64	150.00	13.64	1,513.64	1,500.00	13.64	1,800.00
39 - Miscellaneous Expenses	0.00	0.00	0.00	-533.43	0.00	-533.43	0.00
Total Expense	59,380.20	78,336.61	-18,956.41	776,298.81	849,652.87	-73,354.06	1,011,144.53
Net Ordinary Income	23,788.71	10,203.39	13,585.32	130,996.83	123,377.13	7,619.70	138,965.47
Net Income	23,788.71	10,203.39	13,585.32	130,996.83	123,377.13	7,619.70	138,965.47

Mid-Willamette Family YMCA

Early Learning Center

November 2022

	Nov 22	Budget	\$ Over Budget	Jan - Nov 22	YTD Budget	\$ Over Budget	Annual Budget
Ordinary Income/Expense							
Income							
01 · Contribution	49,090.91	41,200.00	7,890.91	665,557.57	540,830.00	124,727.57	582,030.00
13 · Program Income	20,527.00	47,340.00	-26,813.00	301,480.98	520,740.00	-219,259.02	568,080.00
16 · Miscellaneous	0.00	0.00	0.00	9,875.00	0.00	9,875.00	0.00
Total Income	69,617.91	88,540.00	-18,922.09	976,913.55	1,061,570.00	-84,656.45	1,150,110.00
Gross Profit	69,617.91	88,540.00	-18,922.09	976,913.55	1,061,570.00	-84,656.45	1,150,110.00
Expense							
21 · Salaries & Wages	46,791.60	51,810.00	-5,018.40	511,027.99	547,971.50	-36,943.51	599,781.50
22 · Employee Benefits	4,945.00	8,437.00	-3,492.00	40,600.35	92,807.00	-52,206.65	101,244.00
23 · Payroll Taxes	4,642.48	3,963.47	679.01	54,661.24	41,919.83	12,741.41	45,883.30
24 · Contract Services	1,245.14	2,249.00	-1,003.86	29,274.34	24,739.00	4,535.34	27,000.00
25 · Supplies	3,378.36	7,466.57	-4,088.21	130,816.72	126,932.27	3,884.45	134,398.84
26 · Telephone & Communications	693.36	200.00	493.36	6,649.34	2,102.00	4,547.34	2,302.00
27 · Postage & Shipping	0.00	0.00	0.00	31.00	0.00	31.00	0.00
28 · Occupancy	982.10	1,127.94	-145.84	11,202.15	13,057.35	-1,855.20	14,185.29
29 · Equipt. & Building Cost, Leases	955.00	2,000.00	-1,045.00	32,074.75	42,500.00	-10,425.25	44,500.00
31 · Printing, Publishing, Promotion	0.00	416.66	-416.66	2,061.67	4,583.26	-2,521.59	5,000.00
32 · Travel & Employee Expenses	0.00	42.00	-42.00	0.00	462.00	-462.00	500.00
33 · Conf/Conv/Meetings	514.38	208.33	306.05	1,685.91	2,291.63	-605.72	2,500.00
35 · Payment of Dues	359.22	1,770.80	-1,411.58	15,346.24	19,478.80	-4,132.56	21,249.60
37 · Financing	514.51	900.00	-385.49	5,090.92	9,900.00	-4,809.08	10,800.00
38 · Liability Insurance	163.64	150.00	13.64	1,677.28	1,650.00	27.28	1,800.00
39 · Miscellaneous Expenses	0.00	0.00	0.00	-533.43	0.00	-533.43	0.00
Total Expense	65,184.79	80,741.77	-15,556.98	841,666.47	930,394.64	-88,728.17	1,011,144.53
Net Ordinary Income	4,433.12	7,798.23	-3,365.11	135,247.08	131,175.36	4,071.72	138,965.47
Net Income	4,433.12	7,798.23	-3,365.11	135,247.08	131,175.36	4,071.72	138,965.47

TAMI SPETEN

2673 Broadway St. NW Albany, OR 97321 · (541) 990-7940
tamimspeten@gmail.com

Objective: To find a rewarding position that matches my skills, where I can work within a team of professionals with similar goals.

EXPERIENCE

MAY, 2017 TO PRESENT

OUTREACH COORDINATOR, MID-WILLAMETTE FAMILY YMCA

Grant writing and management

2015 TO PRESENT

OWNER, SASSY CAKES

Designer and baker of creative, custom desserts.

SEPTEMBER, 2008 TO APRIL, 2015

OCCUPATIONAL THERAPIST, LINN BENTON LINCOLN EDUCATION SERVICE DISTRICT

Evaluation and treatment of pediatric students with developmental disabilities.

EDUCATION

JUNE 1994

BS PSYCHOLOGY & HUMAN DEVELOPMENT, UNIVERSITY OF CALIFORNIA DAVIS

3.85 GPA

DECEMBER 1997

MASTER OF OCCUPATIONAL THERAPY, UNIVERSITY OF PUGET SOUND

3.65 GPA graduated with Honors

SKILLS

- Evaluation, Assessment with Standardized testing
- Progress measurement and reporting
- Grant writing
- Sensory evaluation
- Handwriting without Tears - certified

PUBLICATION:

"Sensory Integrative-Based Occupational Therapy and Functional Outcomes in Young Children with Pervasive Developmental Disorders: A Single-Subject Study" by T. Speten (nee Linderman) published in American Journal of Occupational Therapy, 1999 vol. 53(2) 207-213.

Patty Shukle

patty.shukle@gmail.com
(541) 519-3063
PO Box 334
Halsey, OR

Summary

Experienced early childhood educator of 10 years with diverse knowledge of early learning and development, as well as with recent experience as childcare center director. Passionate about supporting educators and other staff in providing safe and developmentally appropriate environments for young children to thrive in. Dedicated to partnering with families to help foster trust between them and the educational system.

Experience

Director

Baker YMCA Child Care Center • Baker City, OR
08/2021 - Present

Managed start-up of a brand new licensed child care center, from building inspections to hiring new employees

Established strong working relationship with YMCA management and Child Care Center team, as well as State Licensors

Collaborated with six-member leadership team from Baker Early Learning Center

Balanced enrollment numbers and classroom opening dates keeping in mind children who would age up from one room to another

Lead Teacher

Eastern Oregon University Head Start • Baker City, OR
08/2018 - 06/2019

- Supervise one teaching assistant, training them in self-control, classroom management, and lesson plan development
- Collaborate with mental health professionals and speech pathologists to provide differentiated instruction and classroom accommodations/modifications
- Address any student behavioral problems, calming disruptive students and escalating to home-based education if necessary
- Create detailed lesson plans based on students' current knowledge and state requirements
- Met federal requirements for recordkeeping

Lead Teacher Preschool/Pre-K

Bates Technical College ECEAP • Tacoma, WA
02/2016 - 06/2018

- Supervise two teaching assistants, training and learning from them in behavior/classroom management
- Collaborate with special education teacher and speech pathologists to provide differentiated instruction and classroom accommodations/modifications
- Create detailed lesson plans based on students' current knowledge and state requirements
- Address any student behavioral problems, calming disruptive students and keeping them at school
- Establish clear learning objectives for 40 students, including 10 students on IEPs
- Communicated clearly with parents and teacher to fully understand student needs

- Teach two classes of 20 students

Pre-K Paraprofessional

Haines Elementary School • Haines, OR
09/2011 - 06/2015

- Collaborate with classroom teacher to provide differentiated instruction
- Provided 1:1 support for Pre-K students with behavioral difficulties
- Supervised learning centers
- Fill in for teacher occasionally
- Communicated clearly with parents and teacher to meet student needs

Skills

- Step 10 on ORO
- Organized
- Team oriented
- Strong work ethic
- Responsible
- Strong leadership abilities
- Friendly personality

Education

BS Liberal Studies/Early Childhood Education

Eastern Oregon University • La Grande, OR
03/2022

Languages

- English

Non-discrimination Policy:

The YMCA is a place for all. Our engagement with the community is far-reaching, but we recognize the need for continued focus on outreach. Our Board of Directors and Staff are representative of the community we serve, and the statistics represent the overall demographic of this area. However, we recognize the pressing and imperative need to reach minority populations that are uniquely vulnerable, and, accordingly, we are ramping up our efforts in outreach and networking with other organizations to work toward a goal of greater diversity.

At the Mid-Willamette Family YMCA we value unique individuals, and we welcome the variety of experiences they bring to our organization in all capacities. As such, we have a strict non-discrimination policy. We believe everyone should be treated equally regardless of race, sex, gender identification, sexual orientation, national origin, native language, religion, age, disability, marital status, citizenship, genetic information, pregnancy, or any other characteristic protected by law. If you feel that you have been discriminated against, please contact our Human Resources Department as soon as possible. Every complaint will be appropriately investigated.



Department of the Treasury
Internal Revenue Service

P.O. Box 2508
Cincinnati OH 45201

In reply refer to: 0248351232
Mar. 19, 2013 LTR 4168C E0
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MID-WILLAMETTE FAMILY YMCA INC
3311 PACIFIC BLVD SW
ALBANY OR 97321-7707



010491

Employer Identification Number: 93-0479079
Person to Contact: Mr. Kelley
Toll Free Telephone Number: 1-877-829-5500

Dear Taxpayer:

This is in response to your Mar. 08, 2013, request for information regarding your tax-exempt status.

Our records indicate that you were recognized as exempt under section 501(c)(3) of the Internal Revenue Code in a determination letter issued in December 1960.

Our records also indicate that you are not a private foundation within the meaning of section 509(a) of the Code because you are described in section 509(a)(2).

Donors may deduct contributions to you as provided in section 170 of the Code. Bequests, legacies, devises, transfers, or gifts to you or for your use are deductible for Federal estate and gift tax purposes if they meet the applicable provisions of sections 2055, 2106, and 2522 of the Code.

Please refer to our website www.irs.gov/eo for information regarding filing requirements. Specifically, section 6033(j) of the Code provides that failure to file an annual information return for three consecutive years results in revocation of tax-exempt status as of the filing due date of the third return for organizations required to file. We will publish a list of organizations whose tax-exempt status was revoked under section 6033(j) of the Code on our website beginning in early 2011.

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MID-WILLAMETTE FAMILY YMCA INC
3311 PACIFIC BLVD SW
ALBANY OR 97321-7707

If you have any questions, please call us at the telephone number shown in the heading of this letter.

Sincerely yours,

Richard McKee

Richard McKee, Department Manager
Accounts Management Operations